DOCUMENT RESUME

ED 213 933 CE 031 662

AUTHOR Smith, Kathryn Scruggs
TITLE Retailing I: A Foundation for Marketing and Distributive Education Curriculum Development.
INSTITUTION Western Kentucky Univ., Bowling Green. Center for Career and Vocational Teacher Education.
SPONS AGENCY Kentucky State Dept. of Education, Frankfort. Bureau of Vocational Education.
PUB DATE Jun 81
NOTE 266p.

EDRS PRICE MF01/PC11 Plus Postage.
DESCRIPTORS Behavioral Objectives; Check Lists; Cognitive Objectives; Competence; *Competency Based Education; Curriculum Development; *Distributive Education; Educational Resources; Guidelines; Instructional Materials; *Job Skills; Learning Activities; *Marketing; Psychomotor Objectives; *Retailing; *Sales Occupations; Secondary Education
IDENTIFIERS Receiving Clerks; Stock Clerks

ABSTRACT

Designed to serve as a foundation for competency-based marketing and distributive education curriculum development, this package consists of task lists, performance objectives, and performance guides for use in planning an introductory level retailing course. Job descriptions are given for receiving clerks, stock clerks, and salespersons/sales clerks in retail trade. Following a marketing and distributive education curriculum sequence, a marketing and distributive education occupational task matrix is provided. Presented next are Retailing I tasks, performance objectives, performance guides, instructor's check lists, and references/resources for the following job skill areas: ordering, receiving, storing, inventorying, shipping, stocking, displaying, store operating, cashiering, customer servicing, selling, and employee training. Also listed are Retailing I psychomotor and cognitive skill statements as referenced to Interstate Distributive Education Curriculum Consortium (IDECC) learning activity packages and competency numbers. The occupations to which these skill statements pertain are receiving clerk, stock clerk, and salesperson/sales clerk. Completing the package is a list of retailing occupation references. (MN)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

KY8113329

ED213933

marketing & distributive education

RETAILING 1:

a foundation for marketing and distributive education curriculum development

kathryn scruggs smith • project director • june 1981

- tasks
- performance objectives
- performance guides

CE031662

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION
CENTER (ERIC)

☑ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

J. D. Ellis

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

ACKNOWLEDGEMENTS

Appreciation is expressed to the many individuals who have contributed personal assistance and technical guidance in the development and completion of this project. Without the support of these people, the accomplishment of this project's goals would not have been possible.

Special thanks to Mr. Merle Insko, Curriculum Specialist and Dr. Dwight Cline, Coordinator, Center for Career and Vocational Teacher Education, who have provided assistance, advice, and encouragement and to Mrs. Beth Breeden, Secretary, and Miss Marcia Hardin, Student Secretary, who provided efficient clerical assistance.

Table of Contents

Page

I. Introduction. 1

II. Retailing I Job Descriptions. 2
  A. Receiving Clerk 2
  B. Stock Clerk 2
  C. Salesperson/Sales Clerk Retail Trade. 3

III. Retailing I: A Marketing and Distributive Education Curriculum Sequence 4

IV. Retailing I Matrix. 6

V. Retailing I Tasks, Performance Objectives, Performance Guides, Instructor's Checklists and References/Resources
  A. Performing Ordering Activities. 24
  B. Performing Receiving Activities 36
  C. Performing Storing Activities 81
  D. Performing Inventorying Activities. 99
  E. Performing Shipping Activities. 111
  F. Performing Stocking Activities. 117
  G. Performing Displaying Activities. 132
  H. Performing Store Operating Activities 157
  I. Performing Cashiering Activities. 182
  J. Performing Customer Service Activities. 206
  K. Performing Selling Activities 229
  L. Performing Employee Training Activities 238

VI. Retailing I Psychomotor and Cognitive Skill Statements As Referenced to IDECC Learning Activity Packages and Competency Numbers. 242
  A. Receiving Clerk 242
  B. Stock Clerk 245
  C. Salesperson/Sale Clerk. 249

VII. Retailing Occupation References 256

INTRODUCTION

The Center for Career and Vocational Teacher Education has been granted funding through the Bureau of Vocational Education to carry-out a project to develop Marketing and Distributive Education curriculum materials. This project is research-based and seeks to accomplish the following objective:

> Prepare task lists, performance objectives, and performance guides for entry-level Retailing occupations which will serve as a foundation for competency based curriculum development.

This objective has been achieved by the following steps:

1. Review, evaluate and convert competencies identified by the Interstate Distributive Education Curriculum Consortium (IDECC), to psychomotor task statements and cognitive skill statements.
2. Reference cognitive statements to corresponding psychomotor task statements.
3. Reference IDECC Competency numbers and Learning Activity Package numbers to psychomotor task statements and cognitive skill statements
4. Compare task statements identified to references dealing with retailing occupations.
5. Include any additional task statements identified to the Retailing I task list.
6. Convert task statements to performance guides and performance objectives.
7. Reference IDECC Learning Activity Package numbers and competency numbers to task statements, performance guides, and performance objectives.
8. Review task statements, performance guides and performance objectives with a panel of incumbent workers and educators.

RETAILING I JOB DESCRIPTIONS

222.387-050 SHIPPING AND RECEIVING CLERK (clerical)

Verifies and keeps records on incoming and outgoing shipments and prepares items for shipment. Compares identifying information and counts, weighs, or measures items of incoming and outgoing shipments to verify against bills of lading, invoices, orders, or other records. Determines method of shipment, utilizing knowledge of shipping procedures, routes, and rates. Assembles wooden or cardboard containers or selects preassembled containers. Inserts items into containers, using spacers, fillers, and protective padding. Nails covers on wooden crates and binds containers with metal tape, using strapping machine. Stamps, stencils, or glues identifying information and shipping instructions onto crates or containers. Posts weights, shipping charges and affixes postage. Unpacks and examines incoming shipments, rejects damaged items, records shortages, and corresponds with shipper to rectify damages and shortages. Routes items to departments. May operate tier-lift truck or use handtruck to move, convey, or hoist, shipments from shipping-and-receiving platform to storage or work area. May direct others in preparing outgoing and receiving incoming shipments. May perform only shipping or receiving activities and be known as SHIPPING CLERK (clerical) or RECEIVING CLERK (clerical).

299.367-014 STOCK CLERK (retail trade)

Performs any combination of following duties in self-service store: Marks order form to order merchandise based on available shelf space, merchandise on hand, customer demand, or advertised specials. Periodically counts merchandise to take inventory or examines shelves to identify which items need to be reordered or replenished. Unpacks cartons and crates of merchandise, checking invoice against items received. Stamps or attaches prices on merchandise or changes price tags, referring to pricelist. Stocks shelves with new or transferred merchandise. Sets up advertising signs and displays merchandise on shelves, counters, or tables to attract customers and promote sales. Cleans display cases, shelves, and aisles. May itemize and total customer's selection at check out counter, using cash register, and make change or charge purchases. May pack customers purchases in bags or cartons. May carry packages to customer's automobile.

222.387-058 STOCK CLERK (clerical) stock checker; stockroom clerk; storekeeper; storeroom clerk; storeroom keeper; store clerk; supply clerk; supply-room clerk.

Receives, stores, and issues equipment, material, supplies, merchandise, foodstuffs, or tools, and compiles stock records in stockroom, warehouse, or storage yard. Counts, sorts, or weighs incoming articles to verify receipt of items on requisition or invoices. Examines stock to

222.387-058 STOCK CLERK (continued)

verify conformance to specifications. Stores articles in bins, on floor, or on shelves, according to identifying information, such as style, size, or type of material. Fills orders or issues supplies from stock. Prepares periodic, special, or perpetual inventory of stock. Requisitions articles to fill incoming orders. Compiles reports on use of stock handling equipment, adjustments of inventory counts and stock records, spoilage of or damage to stock, location changes, and refusal of shipments. May mark identifying codes, figures, or letters on articles. May distribute stock among production workers, keeping records of material issued. May make adjustments or repairs to articles carried in stock. May determine methods of storage, identification, and stock location, considering temperature, humidity, height and weight limits, turnover, floor loading capacities, and required space. May cut stock to size to fill order. May move or transport material or supplies to other departments, using hand or industrial truck.

290.477-014 SALES CLERK (retail trade)

Obtains or receives merchandise, totals bill, receives payment, and makes change for customers in such retail stores as tobacco shop, drug store, candy store, or liquor store. Stocks shelves, counters, or tables with merchandise. Sets up advertising displays or arranges merchandise on counters or tables to promote sales. Stamps, marks, or tags price on merchandise. Obtains merchandise requested by customer or receives merchandise selected by customer. Totals price and tax on merchandise selected by customer, using paper and pencil, cash register, or adding machine, to determine bill; receives payment, and makes change. Occasionally calculates sales discount in determining sales slip. Wraps or bags merchandise for customers. Cleans shelves, counters, or tables as necessary. May keep record of sales, prepare inventory of stock, or order merchandise. May be designated according to product sold or type of store.

U. S. Department of Labor, Employment and Training Administration. Dictionary of Occupational Titles, 4th edition. Washington: U. S. Government Printing Office, 1977.

RETAILING I

A Marketing and Distributive Education Curriculum Sequence

I. Introduction to Marketing and Distributive Education
   A. Retailing: Past, Present, Future
   B. Retailing Occupations
   C. Identification of Career Objectives
   D. Introduction to Retailing Curriculum
   E. Introduction to DECA

II. Marketing and Marketing Functions
   A. Overview of Economic Goods, Services, and Resources
   B. Definition of Marketing and Marketing Vocabulary
   C. Marketing Function
   D. Channels of Distribution

III. Market Pricing
   A. Supply and Demand
   B. Product Utility
   C. Competition
   D. Pricing

IV. Competencies: Receiving Clerk, Stock Clerk, and Salesperson/Sales Clerk Retail Trade
   Major Duty Areas:
   A. Performing Ordering Activities
   B. Performing Receiving Activities
   C. Performing Storing Activities
   D. Performing Inventorying Activities
   E. Performing Shipping Activities
   F. Performing Stocking Activities
   G. Performing Displaying Activities
   H. Performing Store Operating Activities
   I. Performing Cashiering Activities
   J. Performing Customer/Service Activities
   K. Performing Selling Activities
   L. Performing Employee Training Activities

V. Employability Skills Modules
   A. Matching Yourself With Suitable Jobs
   B. Getting Ready For Your Job Search
   C. Preparing A Resume
   D. Finding Job Openings
   E. Writing A Letter of Application
   F. Filling Out A Job Application.
   G. Taking Preemployment Tests
   H. Preparing For The Job Interview
   I. Interviewing For The Job
   J. Getting To Know The Job
   K. Presenting An Acceptable Appearance For The Job
   L. Having Good Work Attitudes
   M. Practicing Good Work Habits

N. Using The Telephone
O. Attitudes and Safety
P. Observing General Safety Rules
Q. The Function Of Our Economic System
R. Basic Types Of Business Organization
S. What Our Economy Provides
T. How Our Economy Works

VII. Orientation to Marketing and Distributive Education Coop

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING ORDERING ACTIVITIES											
Prepare Requisition Documents for Supplies; for Merchandise		X	X	X							
Order Merchandise			X	X							
Call Merchandise Orders to Wholesalers			X	X							
Process Customer's Special Orders			X	X							
Record Customer's Request for Merchandise				X							

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

D. O. T. JOB CLASSIFICATIONS

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING RECEIVING ACTIVITIES											
Mark Cartons with Identification Code		X									
Record Incoming Merchandise on Receiving Form		X									
Open Containers with Tools		X	X	X							
Check-in Individual Items of Merchandise		X	X								
Record and Handle Damaged and Broken Merchandise		X	X	X							
Prepare Overage, Shortage and Discrepancy (OS&D) Report		X	X	X							
Follow-up Non-Delivered or Lost Merchandise		X									
File Claims on Carriers or Vendors for Damages, Shortages, Misrouting, Improper Packaging, Substitutions, Lost Orders, Overages, and/or Back Or		X									

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING RECEIVING ACTIVITIES											
Report Shipments Received to Appropriate Departments		X	X								

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING RECEIVING ACTIVITIES											
Enter Invoice in Invoice Register (optional)		X									
Check Invoice Against Purchase Order		X									
Register Invoice on Invoice Apron/Rubber Stamp Form		X									
Safely Handle Tools and Equipment		X	X	X							
Safely Lift, Carry and Put Down a Load		X	X	X							
Handle Employee/Customer Accidents		X	X	X							
Assist Carrier Unload		X									
Check Freight Bill/Delivery Receipt		X									

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING STORING ACTIVITIES											
Maintain and Update Master Warehouse Location Plans		X	X								
Maintain and Update Stock Location Directory		X	X								
Carry-Out Safety Procedures for Stacking/Piling Goods		X	X								
Palletize a Unit Load		X									
Move Goods to Storage Area		X	X								
Store Merchandise and Supplies		X	X								
Store Items Classified as Sensitive, Hazardous, and/or Flammable		X	X								

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING INVENTORYING ACTIVITIES											
Prepare Stock for Inventory		X	X	X							
Take Inventory		X	X	X							
Adjust Inventory Records		X	X								
Maintain and Update Stock Record Cards		X	X								
Audit Stock Balance and Consumption Reports		X	X								

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

D. O. T. JOB CLASSIFICATIONS

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING SHIPPING ACTIVITIES											
Prepare Goods for Return to Manufacturer		X	X	X							
Transfer Stock to Branch Stores			X	X							

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING STOCKING ACTIVITIES											
Obtain Goods from Stockroom or Warehouse			X								
Deliver Goods to Proper Department		X	X								
Check-in Merchandise Received from Stockroom			X	X							
Price Mark Merchandise		X	X	X							
Shelve Merchandise			X	X							
Count Stock to be Advertised			X	X							
Change Prices on Merchandise			X	X							

The table headers above span the job-classification columns under "D. O. T. JOB CLASSIFICATIONS".

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

D. O. T. JOB CLASSIFICATIONS

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING DISPLAYING ACTIVITIES											
Design Point-of-Purchase Signs				X							
Letter Signs				X							
Set Up Manufacturer's Displays			X	X							
Set Up Counter Displays			X	X							
Dress Mannequins			X	X							
Set Up Window Displays			X	X							
Set Up Mass Displays			X	X							
Tidy Up Displays			X	X							

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING STORE OPERATING ACTIVITIES											
Open Store				X							
Prepare Check-Out Area for Business Day				X							
Prepare Cash Drawer				X							
Fill Out Credit Application Form				X							
Receipt Customer's Accounts Receivable				X							
Balance Cash Register				X							
Close Out Department				X							
Fill Out Bank Deposit Forms				X							

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

D. O. T. JOB CLASSIFICATIONS

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING CASHIERING ACTIVITIES											
Process Bank Card Sales Transactions			X	X							
Process Charge Sales Transactions			X	X							
Process Cash Sales Transactions			X	X							
Accept Valid Consumer Redeemable Coupons			X	X							
Determine Amount of Sales Tax			X	X							
Authorize Customers' Checks			X	X							
Make Change			X	X							
Issue Trading Stamps			X	X							
[illegible]kag[illegible]g C[illegible]mer[illegible]rde[illegible]of [illegible]han[illegible]			X	X							

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014
PERFORMING CUSTOMER SERVICE ACTIVITIES				
Answer Customer Inquiries Concerning Directions; Concerning Customer Facilities; Concerning Store Policy			X	X

D. O. T. JOB CLASSIFICATIONS

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

D. O. T. JOB CLASSIFICATIONS

JOB CLUSTER: RETAILING I

DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
PERFORMING SELLING ACTIVITIES											
--Handle Customer Objectives				X							
--Handle Difficult Customers				X							
--Suggest Substitute Merchandise				X							
--Suggest Advertised Merchandise				X							
--Close the Sale				X							
--Suggest Accessory Items				X							
Demonstrate Merchandise				X							

MARKETING AND DISTRIBUTIVE EDUCATION

OCCUPATIONAL TASK MATRIX

JOB CLUSTER: RETAILING I

D. O. T. JOB CLASSIFICATIONS

	DUTY AREAS AND TASK LIST		RECEIVING CLERK 222.387-050	STOCK CLERK 299.367-014, 222.387-058	SALESPERSON/SALES CLERK RETAIL TRADE 290.477-014							
	PERFORMING EMPLOYEE TRAINING ACTIVITIES											
	Assist with Training/Sponsoring New Employees		X	X	X							

DUTY AREA:
PERFORMING ORDERING ACTIVITIES

Retailing I:
A Foundation for Marketing and Distributive Education Curriculum Development

By
Kathryn Scruggs Smith
Project Director

June, 1981
Center for Career and Vocational Teacher Education
Western Kentucky University
Bowling Green, Kentucky
42101

Project Number:
4429

The Research reported herein was performed pursuant to a contract with the Commonwealth of Kentucky, State Department of Education, Bureau of Vocational Education. Contractors undertaking projects under such sponsorship are encouraged to express freely their professional judgement in the conduct of the project. Points of view or opinions stated not, therefore, necessarily represent official State Department of Education position or policy.	Commonwealth of Kentucky State Department of Education Bureau of Vocational Education

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Prepare Requisition Documents For Supplies; For Merchandise

PERFORMANCE OBJECTIVE: Given stock records, blank requisition forms, catalogs of suppliers of goods; survey stock records to determine items needed, and prepare requisitions. The requisition documents must be fully completed on the proper form and writing must be legible.

PERFORMANCE GUIDE:

1. List items needed after surveying inventory records.
2. Obtain blank requisition forms.
3. Identify suppliers of goods needed.
4. Prepare requisition noting:
    a. Quantity
    b. Stock number
    c. Description
5. Keep your copy and forward original and other copies to appropriate store personnel.

References/Resources:

VTECS Warehouse Worker 58/73 Prepare Requisition Documents

IDECC 635/013 Know procedures for requisitioning and obtaining supplies

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Order Merchandise

PERFORMANCE OBJECTIVE: Given a purchase order form and a want slip or requisition for merchandise, fill out the purchase order form. The completed purchase order should contain all the required information in the appropriate spaces.

PERFORMANCE GUIDE:

1. Take care to insure accuracy of the order.
2. Read the requisition or want book to determine what merchandise to order.
3. Write vendor's name and address on purchase order.
4. Write the following information on the order form:
    a. Name of the store
    b. Complete address
    c. Department identification
    d. Description of the merchandise including size, color, style, classification
    e. Requested shipping and delivery dates
    f. Condition of the order
    g. Method of shipment (may include specific carrier)
    h. Other special instructions
5. Mail completed order to vendor.

References/Resources:

VTECS Fashion Salesperson 20/34 Order merchandise

IDECC 433/Mdse 9 Place orders of merchandise

430/Mdse 19 Know procedures for ordering merchandise

439/Mdse 19 Prepare merchandise order forms

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Call Merchandise Orders To Wholesalers

PERFORMANCE OBJECTIVE: Given a shop order for merchandise that is to be called to a wholesaler and access to a telephone, call the wholesaler and place the order. All applicable criteria on the instructor's checklist must be acceptably completed.

PERFORMANCE GUIDE:

1. Read the order to determine that all merchandise is clearly listed.
2. Place the call to the wholesaler.
3. Identify self and name of business to order clerk.
4. Place the order by giving the order clerk:
   a. Name of merchandise
   b. Quantity wanted
5. Ask order clerk to verify order by reading it back.
6. Note any item that wholesaler cannot supply.
7. Be prepared to make second choices.
8. Specify pick up or delivery.
9. Indicate date of order.

INSTRUCTOR CHECKLIST: Called Merchandise Orders To Wholesalers

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Identified self and name of business to the wholesaler's order clerk?			
2. Placed the order by giving the order clerk the name of each item and the quantity needed?			
3. Asked the order clerk to verify the complete order?			
4. Noted each item that was not available?			
5. Requested substitutes for unavailable items?			
6. Specified if the order was to be picked up or delivered?			
7. Requested and noted a delivery date for the order?			

References/Resources:

VTECS Retail Flowershop Salesperson 44/108 All merchandise orders to wholesalers

IDECC 433/Mdse 9 Place orders of merchandise

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Customer's Special Orders

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make a special order and a special request order form, process the customer's special order request. All required information must be included on the order form. (The register reading and the amount of the deposit on the order form must be equal).

PERFORMANCE GUIDE:

1. Ask the customer for the information that is required for completing the special order form:
   a. Customer's name, address and phone number
   b. A description of the merchandise
      -Color and size
      -Number of items
      -Stock and style number
2. Read the information back to the customer to validate it.
3. Tell the customer the anticipated date of arrival of the merchandise.
4. If necessary, ask the customer for signature.
5. Send the special order request to the designated store employee.

*Note: 1. Determine if merchandise requested is available
2. Inform customer of cost of merchandise
3. Prepare special order form
4. Secure deposit (Ring up deposit and put it in cash register) if applicable
5. Attach cash register receipt to copy of special order form and give it to customer
6. Put copy of special order in register

References/Resources:

VTECS Fashion Salesperson 35/51 Process customers' special order

Hardware Salesperson 18/31 Process customers' special order

IDECC 464/Mdse 19 Handle special order of merchandise

404/Mdse 19 Know how to handle special order of merchandise

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Record Customer's Request For Merchandise

PERFORMANCE OBJECTIVE: Given a special request for merchandise and forms for recording it, record the customer's request for merchandise. The request form must include the following information: status of merchandise (special order, new, out-of-stock), customers name and address, description of merchandise and approximate delivery date.

PERFORMANCE GUIDE:

1. Check the appropriate box or boxes:
    a. special order
    b. new item
    c. out-of-stock
2. Write the customer's name, address and phone number.
3. Write a description of the merchandise:
    a. item
    b. brand
    c. size
    d. quantity
4. Write approximate date of delivery.

DUTY AREA:
PERFORMING RECEIVING ACTIVITIES

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Enter Invoice In Invoice Register (Optional)

PERFORMANCE OBJECTIVE: Given an invoice and an invoice register, enter the invoice on the invoice register. All information must be correctly and legibly entered on the invoice register.

PERFORMANCE GUIDE:

1. Date stamp the invoice.
2. Record invoice number and date.
3. Record the source of the merchandise.
4. Record the amount of the invoice.
5. Send/file invoice in appropriate location.

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Check Invoice Against Purchase Order

PERFORMANCE OBJECTIVE: Given shipping records and current purchase orders for incoming goods, verify the records and content of the order. If the invoice and the purchase order for the shipment do not match, an OS&D report must be completed without error and/or all discrepancies must be noted on the invoice.

PERFORMANCE GUIDE:

1. Obtain current and open purchase orders.
2. Obtain packing list.
3. Check and compute figures.
4. Verify packing list against goods received.
5. Verify packing list against purchase orders.
6. Note any back orders.
7. Complete an overage, shortage and damaged (OS&D) report if necessary.

References/Resources:

VTECS Warehouse Worker 28/42 Check invoice against purchase order

X Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Register Invoice On Invoice Apron/Rubber Stamp Form

PERFORMANCE OBJECTIVE: Given an invoice and an invoice apron/rubber stamp form, register the invoice. All applicable information must be correctly and legibly entered on the invoice apron/rubber stamp form.

PERFORMANCE GUIDE:

1. Attach the invoice apron to the invoice or stamp back of invoice with rubber stamp form.
2. Check the invoice with the original purchase order for quantity, type, price, terms and routing.
3. Note any differences on the invoice apron/rubber stamp form.
4. Record department number, order number, terms on the order and the invoice, routing and the date checked.
5. Note the amount, date, invoice number and balance due on orders shown incomplete by the invoice (if necessary).
6. Initial or sign.
7. File the purchase order.
8. Place the invoice on file to await receipt of the merchandise. (Optional, this procedure is used when invoice is received and checked before order is received)
9. Record the receiving number and the date the shipment is checked.

References/Resources:

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

WHOLESALING AND PHYSICAL DISTRIBUTION. Kenneth Ertel and Lawrence Walsh. Gregg Division, McGraw-Hill Book Co., 2nd ed., 1978.

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Safely Handle Tools And Equipment

PERFORMANCE OBJECTIVE: Given a variety of case studies indicate the correct safety procedures performed in each situation. Each case must be answered correctly.

PERFORMANCE GUIDE:

Store Equipment and Facilities	Accident Prevention and Care
1. Bailing or Trash Room	
a. Waste Paper	a. Packing materials, such as straw and excelsior, removed immediately or in metal can with tight cover
b. Floor	b. Floor clean
c. Cartons	c. Cartons flattened
d. Metal materials	d. Metal separated from burnable materials
e. Fire door	e. Fire door open
f. Door way	f. Door way unobstructed
2. Carton Openers	a. Used for opening cartons only b. No other objects are to be used to open cartons
3. Ceiling and Walls	a. No holes b. No broken or cracked plaster, tile, or vitriolite c. No peeling paint d. No broken windows
4. Chairs and Tables	a. No broken area or sharp edges on or under chairs and tables b. Free of splinters and gum c. No holes in seats d. No broken springs
5. Counter Displays	a. Shelves and racks in good condition; adequately braced, sufficiently wide, and lipped to hold merchandise b. Display materials secure; removed to fixture room when not in use c. Pet cages protected with wire mesh where necessary

PERFORMANCE GUIDE (Cont.):

Store Equipment and Facilities(Cont)	Accident Prevention and Care (Cont)
14. Fixture Room and Storage Area a. Fixtures b. Floor	a. Fixtures orderly and glass sized within bins b. Floor clean
15. Floors and Aisles a. Floors b. Drain	a. Keep aisles clear b. No protruding objects c. No holes in flooring d. Drains free so no backflow occurs e. Aisles not blocked by stock, boxes, tools, or merchandise
16. Freight Receiving Area a. Stairways b. Ladders c. Chutes d. Gates	a. Stairways, ladders, and chutes in good condition b. No broken steps, rungs, etc. c. Gates protecting openings closed when chute is not used
17. Heating and Air Conditioning	a. Boiler, fan, air conditioning, motor, meter, and main electric switch assembly rooms or areas clean and free of combustibles b. Rooms not used for storage c. Combustibles safe distance from areas d. No missing switch or terminal boxes, plates, or covers
18. Ladders and Stools	a. Equipment secure, adequately braced b. No broken steps, rungs, or platforms c. Proper devices provided and used for climbing d. Stored in designated place when not in use
19. Outside Areas and Roof	a. Alley, window wells, drive, yard, and roof in good condition; free from rubbish, weeds, etc. b. Mouldings, signs, and walls secure and unbroken c. Refuse in covered metal containers
20. Personnel Facilities	a. Cloak, locker, restroom areas, and lavatories properly equipped, clean, and maintained on schedule b. No damaged or broken furniture and fixtures c. Fixtures secure d. Plumbing in working order; not broken or loose parts e. Proper lighting; burned out bulbs replaced

PERFORMANCE GUIDE (Cont):

Store Equipment and Facilities(Cont)	Accident Prevention and Care (Cont)
21. Shopping Carts	a. Clean b. In good condition c. Accident prevention signs properly posted on all carts
22. Sidewalks, Entrances, and Awnings	a. Sidewalks and entrances free from tripping hazards b. Flow of traffic unobstructed c. Doors in good condition and level with walks d. Awnings in good condition and secure e. Show windows and framing secure
23. Sprinkler System	a. Pipe secured to ceiling and free of hanging or stored objects b. Shut-off valves sealed, open, labeled, and readily accessible
24. Stairways	a. Treaded and in good condition b. Handrails in good condition and secure c. Free-flowing traffic; no obstructions d. Signs reading "Caution--Please Use Handrail" posted as instructed
25. Stock Room a. Shelves b. Bins	a. Never reach higher than eye level b. Never lift objects heavier than safety permits c. Shelves secure d. No top-heavy merchandise e. No objects should be protruding from the bins
26. Trucks, Carts, and Baskets	a. None broken b. Clean c. Free from splinters, protruding edges or nails; no loose or missing bolts and wheels
27. Vending Machines	a. Machines level with floor b. Not obstructing traffic c. Machines and areas around and underneath clean d. Coin-operated devices properly grounded e. Machines in working order

PERFORMANCE GUIDE (Cont):

Store Equipment and Facilities (Cont)	Accident Prevention and Care (Cont)
28. Moving Equipment	a. Place the load so it will be carried by the axle and will not slide off. b. Place heavy objects on bottom. c. Build a firm straight, well balanced stack that you can see over and/or around. d. Keep the truck in front of you, never walk backwards down an incline. e. Move a safe speed.

References/Resources:

IDECC 732/02	Carry-out safety procedures for handling equipment and stock arrangement.
615/02	Know how to carry-out safety procedures for handling equipment and stock arrangement.
696/01	Handle and care for store equipment

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Instructional Materials Laboratory, University of Texas at Austin, 1969.

THE RECEIVING, CHECKING, MARKING, AND STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Safely Lift, Carry And Put Down A Load

PERFORMANCE OBJECTIVE: Provided a load, safely lift, carry and put down the load. All items on the instructor's checklist must be performed without error.

PERFORMANCE GUIDE:

Procedures for Lifting:
1. Consider the size, weight, and shape of the object.
2. Give the object a trail lift (one corner); get help if necessary.
3. Firmly balance your body by spreading your feet 8 to 10 inches apart (one foot slightly ahead of the other).
4. Place your feet close to the object (straddle one corner, option) and bend your knees.
5. Crouch down, keeping your back straight.
6. Get a good grip on the object, holding the bottom corner nearest your body. (You may also grip the object on the opposite top and bottom corners)
7. Lift straight up with your leg muscles.
8. Hold the object close to your body.

*Note: When lifting go down almost to the floor on one knee if necessary, but do not go into a full squat. Straightening up from a full squat requires almost twice the effort.

Procedures for Carrying:
1. Check the load for size, loose parts, parts sticking out, etc.
2. Check route for obstacles, doors, stairs, and a place where the load may be set down so the carrier can rest.
3. Lift the load.
4. Carry the load close to your body.

*Note: Never carry a load that cannot be seen over or around.

Carry long objects over the shoulder, with the front end as high as possible.

Many circular objects can be tilted easily and rolled on edge.

PERFORMANCE GUIDE (Cont.)

Procedures for Putting a Load Down:

1. Hold the load close to your body.
2. Bend your knees (back straight) and lower the load with your leg muscles.
3. Set down one corner away from your fingers.
4. Lower the rest of the load.
5. Push objects on tables or shelves with your arms or body.

INSTRUCTOR CHECKLIST: Safely Lift, Carry And Put Down A Load

ACTIVITY	**RATING***	
Checklist for Lifting:	Acceptable	Unacceptable
1. Considered the size, weight, and shape of object?		
2. Gave object a trial lift (requested help if necessary)?		
3. Balanced body?		
4. Placed feet close to object and bent knees?		
5. Crouched down and kept back straight?		
6. Secured a good grip?		
7. Lifted up with leg muscles?		
8. Held object close to body?		
Checklist for Carrying: 1. Checked the load for size, loose parts and parts sticking out?		
2. Checked the route.		
3. Safely lifted the load.		

ACTIVITY Checklist for Carrying (Cont.)	RATING*	
	Acceptable	Unacceptable
4. Carried the load close to the body?		
Checklist for Putting a Load Down: 1. Held load close to body?		
2. Bent knees?		
3. Lowered load with leg muscles?		
4. Set down one corner away from fingers?		
5. Lowered the rest of the load?		

References/Resources:

WAREHOUSING. Melvin Hatchett. Instructional Materials Services, Division of Extension, The University of Texas at Austin, 1974.

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw Hill Book Co., 1980.

RECEIVING, CHECKING, AND MARKING. Kelly Ritch. Instructional Materials Laboratory, University of Texas at Austin, 1969.

WHOLESALING AND PHYSICAL DISTRIBUTION. Kenneth Ertel and Lawrence A. Walsh. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1978.

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Handle Employee/Customer Accidents

PERFORMANCE OBJECTIVE: Given a variety of case studies indicate the correct safety procedures performed in each situation. Each case must be answered correctly.

PERFORMANCE GUIDE:

Customer Accidents

a. Immediately report and if possible, treat simple cuts and burns of customers.
b. If customer falls or faints or is unconscious, do not move him but summon aid quickly.
c. Heat stroke and heart attack or shock may be aggravated by moving the person.
d. If injury is serious, keep customer quiet and summon aid immediately.
e. Make full report of accident if you witnessed it; otherwise, ask customer for details.
f. Never blame the store or equipment for accident. Such testimony may prove damaging in case of suit.
g. Follow store rules where damage is done to automobile or clothing or personal property. Usually this is handled by store manager, owner, or supervisor.
h. Do not volunteer personal opinions concerning cause of accident. Report the facts as you saw them and/or customer told you.
i. If there are other witnesses to the accident, get their testimonies on the proper accident form.

Employee Accidents	a. Always report any accident to yourself or other employee. b. Always treat any cut or burn regardless of how slight. Infection can be serious later on. c. Insurance companies require reports on all accidents. d. If a store nurse or accident station is available, always go there for inspection of an injury. e. Report details, nature of accident, cause, when and where it occurred. f. Use regular accident report blank supplied by store.
Serious Employee or Customer Accidents	a. Summon aid, nurse, doctor, first aid kit, or supervisor. b. Keep customer quiet, warm, free from curious onlookers and crowding. c. Get all the details and facts that are immediately apparent, especially from any witnesses. d. Prevent moving the person until competent aid is summoned. e. Direct customer traffic around and away from scene of accident.

References/Resources:

VTECS Cashier Checker 34/101 Report accidents involving customer

IDECC 02/660 Know how to handle accidents

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Assist Carrier Unload

PERFORMANCE OBJECTIVE: Given loaded carrier, materials handling equipment and necessary forms and shipping records, determine proper equipment to be used and assist carrier unload. All items must be unloaded without damages or injury to personnel and all discrepancies must be noted on shipping document(s).

PERFORMANCE GUIDE:

1. Obtain shipping documents.
2. Request personnel to assist carrier.
3. Secure dock plate.
4. Check vehicle wheels.
5. Utilize safety jacks as needed.
6. Determine weight of goods from freight bill.
7. Choose equipment based on size and weight of goods.
8. Wear gloves if needed.
9. Balance the load.
10. Check goods for damages.
11. Verify proper goods being received.
12. Verify goods count with shipping document.
13. Note any discrepancies on shipping documents.

References/Resources:

VTECS Warehouse Worker 27/41 Assist carrier unload

IDECC 669/04 Know how to unload a delivery truck

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Check Freight Bill/Delivery Receipt

PERFORMANCE OBJECTIVE: Given a freight bill/delivery receipt, check the freight bill/delivery receipt. Incorrect shipments must be refused and any discrepancies noted on the freight bill/delivery receipt and invoice/invoice apron and/or purchase order.

PERFORMANCE GUIDE:

1. Check consignee name.
2. Check supplier name.
3. Get the invoice/invoice apron and/or purchase order.
4. Compare invoice/invoice apron and/or purchase order with freight bill to assure that the goods being delivered are those the store ordered.
5. Note any discrepancies.
6. Refuse incorrect shipments.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Mark Cartons With Identification Code

PERFORMANCE OBJECTIVE: Given an incoming shipment of merchandise, mark the cartons with an identification code. Each carton must be legibly marked with receiving number, department number or warehouse storage number and number of pieces in the shipment. The receiving form must be attached to one of the pieces in the shipment.

PERFORMANCE GUIDE:

1. Mark each carton with the official receiving number.
2. Mark each carton with the number of the department or warehouse area to receive the goods (or the day of delivery).
3. Mark each carton with the number of pieces in the order.
4. Attach copies of the receiving form (and the invoice/invoice apron - optional) to one of the pieces in the order.

References/Resources:

WAREHOUSING. Melvin S. Hatchett. Instructional Materials Services, University of Texas at Austin, 1974.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

RECEIVING, CHECKING, AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

VTECS Warehouse Worker 33/47 Arrange goods according to identification codes

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Record Incoming Merchandise On Receiving Form

PERFORMANCE OBJECTIVE: Provided a shipment of incoming merchandise and a receiving record, record incoming merchandise on the receiving record. The incoming order must be spot checked, the receiving record correctly completed and the order and all documents forwarded to the proper store employees.

PERFORMANCE GUIDE:

1. Record the shipper's name and where the merchandise was shipped from.
2. Record the carrier's name and number.
3. Record freight charges.
4. Record department number.
5. Count and record number of pieces received.
6. Check number of pieces received with number indicated on freight bill, invoice, and/or purchase order and note any discrepancy on the receiving record and the freight bill.
7. Spot check cartons for damages and note on the receiving record and the freight bill.
8. Record the weight of the shipment.
9. Spot check the weight of the shipment and indicate any discrepancy on the freight bill and the receiving record.
10. Record the date shipped and date received.
11. Record the invoice number and the receiving number.
12. Sign the freight bill and receiving record.
13. Keep pieces of one order together.
14. Send the freight bill to traffic office or business office.
15. Route/move merchandise and forms to the checking/marking area.
16. Secure the driver's signature. (Have driver initial any discrepancy)

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert R. Luter. Instructional Materials Center, University of Texas at Austin, 1979.

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

VTECS	Warehouse Worker 31/45	Record carriers name and number on receiving report
	Warehouse Worker 29/43	Check number of cartons against bill of lading, freight bill or manifest
	Warehouse Worker 32/46	Spot check cartons for damage
	Hardware Store Salesperson 22/35	Receive incoming merchandise
IDECC	641/05	Know receiving bookkeeping procedures
	647/05	Know receiving terminology
	702/04	Route merchandise to selling department or reserve stockroom
	707/07	Know how to handle incorrect amounts and/or types of merchandise

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Open Containers With Tools

PERFORMANCE OBJECTIVE: Given a selection of goods to be opened, tools for opening containers; select proper tools, open containers carefully, remove all packaging materials from area, and return tools to proper location. The cartons/containers must be opened without damaging goods or inflicting self injury.

PERFORMANCE GUIDE:

1. Identify type of container.
2. Select proper tools.
3. Corrugated containers: Open corrugated paper container using a knife with a short, sharp blade. Cut tape where flaps come together and fold flaps back.
4. Glued corrugated containers: Cut three edges at top of container with a short, sharp blade. Fold cover back.
5. Nailed wooden container: Inster tool to loosen cover board. Pry upward. Hammer cover board down as soon as nailhead is forced up. Remove nails. Empty and place cover board and nails inside container.
6. Stapled containers: Loosen staples with pry tool. Remove staples.
7. Return tools to proper location
8. Dispose of waste

CAUTION:

a. Bands and wires are tied under pressure and will fly up and out when cut. Secure banding before cutting. Extreme care must be used when cutting band or wire. The loose ends can easily put out an eye or cause other serious injury.
b. Do not insert cutting blade too far into container so that contents of box are damaged. Cut away from body.
c. Care should be exercised with sealing tapes. The edges are often sharp and may easily cut the skin.
d. If a flap is stapled, care should be exercised in forcing the flap open or back. The staples may snag and cut fingers, hands or arms.
e. Wear gloves.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

VTECS Warehouse Worker 45/60 Open containers with proper tools

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Check-In Individual Items Of Merchandise

PERFORMANCE OBJECTIVE: Provided a shipment of merchandise, check each item. All applicable item on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Group all containers for one order according to the receiving number/identification code.
2. Gather the purchase order, invoice/invoice apron, and/or the packing list for each order.
3. Locate container marked "Packing List Enclosed" and open it first.
4. Open containers with proper tools and check for improper packing and packaging.
5. Remove merchandise from container and sort by stock number.
6. Classify order.
7. Check packing list/invoice against the original purchase order.
8. Check merchandise against the invoice for quantity, quality, model, size, color, style, grade, freshness and damage.
9. Write the count on the invoice.
10. Note any discrepancies on the invoice/invoice apron, packing list and purchase order. (overage, shortage, description of damage, etc.)
11. Sign or initial invoice/invoice apron and packing list.
12. Route/move merchandise and forms to the marking department.
13. Dispose of waste.

INSTRUCTOR CHECKLIST: Check-In Individual Items Of Merchandise

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Grouped containers according to receiving number/ identification code?			
2. Gathered necessary documents?			
3. Located and opened container marked "Packing List Enclosed"?			
4. Safely opened containers using proper tools?			
5. Checked containers for proper packing or packaging?			
6. Removed merchandise?			
7. Sorted merchandise by stock number?			
8. Classified order?			
9. Checked packing list/invoice against original pruchase order?			
10. Checked merchandise for: quantity model size color			
style grade freshness damages			

INSTRUCTOR CHECKLIST (Cont.)

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
11. Noted any discrepancies?			
12. Signed or initialed appropriate documents?			
13. Routed/moved merchandise and documents to marking department?			
14. Disposed of waste?			

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Distributive Education Instructional Materials Laboratory, University of Texas at Austin, 1969.

WHOLESALING AND PHYSICAL DISTRIBUTION. Kenneth Ertel and Lawrence Walsh. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1978.

VTECS	Warehouse Worker 28/42	Check invoice against purchase order
	Warehouse Worker 45/60	Open containers with proper tools
	Warehouse Worker 34/48	Check for colors of goods against invoice
	Warehouse Worker 35/49	Check freshness of goods against invoice
	Warehouse Worker 36/50	Check grades of goods against invoices
	Warehouse Worker 37/51	Check models of goods against invoices
	Warehouse Worker 38/52	Check quality of goods against invoices
	Warehouse Worker 39/53	Check sizes of goods against invoices
	Warehouse Worker 40/54	Check quantity of goods received against invoice
	Warehouse Worker 41/55	Check styles of goods against invoice
	Fashion Salesperson 15/28	Check in incoming merchandise
	Retail Flowershop Salesperson 2/11	Check in incoming merchandise
IDECC	702/04	Route merchandise to selling department or reserve stockroom
	708/05	Check in merchandise against the invoice
	638/05	Know procedures for checking in merchandise against invoice
	413/Mdse 25	Know reasons for returning merchandise to manufacturer

_X_ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Record And Handle Damaged And Broken Merchandise

PERFORMANCE OBJECTIVE: Given damaged goods, and appropriate forms, list all damaged goods on form and forward report to appropriate department. Performance will be rated acceptable when all items have been accounted for and all shortages and/or visible damages have been noted and reported to appropriate department. The count must be without error, with legible writing.

PERFORMANCE GUIDE:

1. Identify damaged goods.
2. Fill out damaged merchandise report:
   a. date
   b. stock number
   c. article description
   d. size
   e. quantity
   f. old price
   g. new price
   h. amount
   i. what is wrong with the article
   j. authorization
3. Notify proper departments, if applicable.
4. Mark goods so that others will see the possible hazard.
5. Properly store all damaged goods until authorizations are received for proper disposal or repair, if applicable.
6. Re-tag damaged item and return it to the selling floor, if applicable.

References/Resources:

VTECS Warehouse Worker 47/62 Record broken, short and damaged goods

IDECC 634/011 Know procedures for reporting and recording damanged merchandise

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Prepare Overage, Shortage And Discrepancy (OS&D) Report

PERFORMANCE OBJECTIVE: Given an invoice, bill of lading or freight bill and a description and count of items received, prepare an overage, shortage or discrepancy (OS&D) report. Any overages, shortages and damages must be noted, the packing slip must be signed and dated, and the proper forms must be (1) legible, (2) completely filled out without error, and (3) mathematically correct.

PERFORMANCE GUIDE:

1. Obtain invoice, invoice apron/packing slip and/or bill of lading/freight bill.
2. Check documents for noted discrepancies.
3. If there are overages, shortages, and/or discrepancies, complete OS&D report form accurately.
4. Sign and date OS&D Report and receiving documents.
5. Notify carrier regarding overages, shortages, and/or discrepancies.

References/Resources:

VTECS Warehouse Worker 30/44	Prepare Overage, Shortage and Discrepancy (OS&D) Report
IDECC 639/07	Know how to handle incorrect amounts and/or types of merchandise
707/07	Handle incorrect amounts and/or types of merchandise

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Follow-Up Non-Delivered Or Lost Merchandise

PERFORMANCE OBJECTIVE: Given an invoice and/or purchase order and follow-up non-delivered or lost merchandise. All appropriate people must be notified and all forms must be correctly prepared and sent.

PERFORMANCE GUIDE:

1. Report problem to manager/supervisor.
2. Notify carrier and/or vendor.
3. Prepare and send tracer request form.
4. File claim, if necessary.

_X_ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: File Claims On Carriers Or Vendors For Damages, Shortages, Misrouting, Improper Packaging, Substitutions, Lost Merchandise, Overages And/Or Back Orders

PERFORMANCE OBJECTIVE: Given an OS&D Report and receiving report, list damages, shortages or lost merchandise, file a claim with carriers or vendors. All applicable information must be included on the claim form and all appropriate people notified of the claim.

PERFORMANCE GUIDE:

1. Obtain the receiving report and/or OS&D report. (Invoice and/or purchase order, if applicable)
2. Report problem to supervisor/manager.
3. Notify local freight office and/or warehouse.
4. Have agent inspect damages.
5. Prepare and send copies of the following forms:
    a. Claim form
    b. Bill of lading and waybill
    c. Freight bill
    d. Invoice/invoice apron and packing list
    e. Repair bill, if damage is repaired
    f. Carrier inspection report
    g. List of all items included in the claim
    h. Copies of all correspondence about the claim

References/Resources:

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

IDECC 642/06	Know the procedures for filing claims on carriers and manufacturers
703/06	Determine receiving discrepancies and take proper action

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Report Shipments Received To Appropriate Department

PERFORMANCE OBJECTIVE: Given invoice/packing list, purchase order, or receiving record, prepare and distribute copies of the distribution report. The distribution report must be without error with legible writing, and sent to the appropriate department.

PERFORMANCE GUIDE:

1. Using the invoice/packing list, purchase order or the receiving record, prepare the distribution report.
2. Determine departments to receive copy of the distribution report.
3. Send appropriate copy of the distribution report to pre-determined department.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

VTECS Warehouse Worker 48/63 Report shipments received to appropriate departments

DUTY AREA:
PERFORMING STORING ACTIVITIES

_X_ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Maintain And Update Master Warehouse Location Plans

PERFORMANCE OBJECTIVE: Given a diagram of the warehouse, a master warehouse location plan, a list of goods to be issued and a list of incoming goods; record all merchandise leaving and location and coding for all incoming merchandise. All applicable items on the checklist must have an acceptable rating.

PERFORMANCE GUIDE:

1. Obtain diagram of the warehouse.
2. Designate locations and coding numbers for incoming goods according to master warehouse location plans.
3. Record location of incoming goods in the stock location directory.
4. Locate goods to be issued by referring to the warehouse location plan.
5. Identify goods to be issued by referring to the warehouse location plan.
6. Revise master location plan to reflect merchandise leaving the warehouse or to reflect changes in location of merchandise.

INSTRUCTOR CHECKLIST: Maintain And Update Master Warehouse Location Plan

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Incoming goods given correct coding number?			
2. Noted location of incoming goods in stock location directory?			
3. Merchandise correctly stored (first in) first out like merchandise?			
4. Located goods to be issued?			
5. Goods issued according to first in, first out method?			
6. Revised master warehouse location plan to reflect changes?			

References/Resources:

VTECS Warehouse Worker 43/57 Maintain and update warehouse location plans

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Maintain And Update Stock Location Directory

PERFORMANCE OBJECTIVE: Given stock location directory, a list of goods received, and a list of goods issue, maintain the stock location directory. Update directory daily and provide the following information: quantities on hand, quantities on order, quantities on back order.

PERFORMANCE GUIDE:

1. Obtain stock location directory, list of goods received, list of goods issued, list of goods on order.
2. Designate/record location, coding number, date and quantity of goods received.
3. Record date and quantity of goods issued.
4. Revise stock location directory when relocation occurs.
5. Periodically spot check to insure directory is correctly marked with correct locations.
6. Update location directory at the time of physical inventory.

References/Resources:

VTECS	Warehouse Worker 42/56	Maintain records for control of stored goods
	Warehouse Worker 57/72	Make entries on the stock locator system cards to show changes in location of goods

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Carry-Out Safety Procedures For Stacking/Piling Goods

PERFORMANCE OBJECTIVE: Provided merchandise, safely stack/pile merchandise. All items on the instructor's checklist must be performed without error.

PERFORMANCE GUIDE:

1. Build pile up neatly and firmly.
2. Place torn or broken containers on top of the pile.
3. Stack round objects (drums or barrels) on end and lay a plank on top of each row before placing others above them.
4. An object that must be raised shoulder height or higher should first be to the waist. Rest the object and then bend your knees for spring as you lift.
5. Pile/stack bags with the mouth of the bag on the inside of the pile/stack. Keep the pile/stack less than five feet high.

*Note: 1. Slide object into place if it must fit tightly in a stack.
2. Test ladders for security and firmness before climbing.

INSTRUCTOR CHECKLIST: Carry-Out Safety Procedures For Stacking/Piling Goods

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Built firm, neat pile?			
2. Placed torn or broken cartons on top?			
3. Stacked round objects on end, using planks to secure the next layer?			
4. Safely lifted objects?			
5. Piled bags mouths on the inside?			

References/Resources:

RECEIVING, CHECKING AND MARKING. Kelly Ritch. Instructional Materials Laboratory. University of Texas at Austin, 1969.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

X Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Palletize A Unit Load

PERFORMANCE OBJECTIVE: Provided merchandise, pallets and straps, palletize the merchandise. All applicable items on the instructor's checklist must be completed safely.

PERFORMANCE GUIDE:

1. Choose the type pallet to be used according to size, weight, type, etc. of load.
2. Arrange load on pallet never letting any of the goods extend over the edge of the pallet.
   - -Block pattern arrangement for items of equal length and width.
   - -Brick, row and pinwheel arrangement for items of unequal length or width.
   - -Place inner layer first, working out to pallet edges.
   - -Distribute unused space evenly when stacking containers that do not completely cover the pallet surface.
   - -Crosstie containers (alternate the direction of the containers) to help stabilize the load.
   - -Position carton edges as vertical support for additional tiers. (Most cartons have four edges which are reinforced)
   - -Stack round objects on end with a board between each row.
3. Strap the load, if necessary.
   - -Over-the-load straps for fastening the load up and down
   - -Horizontal straps for fastening the load sideways or around
   - -Both type; fasten horizontal straps first

INSTRUCTOR CHECKLIST: Palletize A Unit Load

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Pallet was selected according to size, weight and type of load?			
2. The load was safely arranged on the pallet?			
3. The load was strapped securely?			

References/Resources:

WAREHOUSING. Melvin Hatchett. Instructional Materials Services, University of Texas at Austin, 1974.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980

WHOLESALING AND PHYSICAL DISTRIBUTION. Kenneth Ertel and Lawrence Walsh. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1978.

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Move Goods To Storage Area

PERFORMANCE OBJECTIVE: Provided goods to be stored and materials handling equipment, move the goods to the storage area. The goods must be moved to the correct location without damage, while avoiding personal injury to mover or fellow workers.

PERFORMANCE GUIDE:

1. Identify proper storage areas using the stock location directory.
2. Choose the best way to move the goods:
   - Determine approximate weight and size of the load
   - Determine materials handling equipment to be used
     - Pallets
     - Containers
     - Dollie/Upright hand truck (two-wheeled hand truck)
     - Platform hand truck (four-wheeled hand truck)/hampers
     - Forklift
     - Conveyor
3. Stack the load evenly. Do not stack the load too high. Do not overload.
4. Balance the load.
5. Check the way ahead.
6. Move the load at a safe speed.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

VTECS Warehouse Worker 44/59 Move goods to proper stocking area

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Store Merchandise And Supplies

PERFORMANCE OBJECTIVE: Given merchandise to be stored, materials handling equipment, and packing slip/invoice; store goods. Performance will be rated acceptable if no parts are damaged while handling, each item is arranged in the correct location, and the stored goods do not present a safety hazard.

PERFORMANCE GUIDE:

1. Identify storage area using the Master Warehouse Location Plan.
2. Determine if location is suitable.
3. If appropriate space is not available, relocate and record location.
4. Move goods to storage area.
5. Arrange stock according to identification code and like items.
6. Rotate stock (first-in/first-out method).
7. Update bin ticket, if necessary.
8. Return all documents to appropriate store employee.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

VTECS Warehouse Worker 49/64 Store goods in proper location

IDECC	648/010	Know types of merchandise storage (Master Warehouse Plan
	615/02	Know storage safety procedures

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Store Items Classified As Sensitive, Hazardous, And/Or Flammable

PERFORMANCE OBJECTIVE: Given goods which are classified as sensitive, hazardous or flammable, provide secure storage. Goods must be stored according to OSHA recommendations and/or store policies.

PERFORMANCE GUIDE:

1. Determine type of classified goods to be stored.
2. Establish secure area as recommended by OSHA.
3. Mark/identify goods and storage area.
4. Check cartons for damage or leakage.
5. Wear gloves and faceshield.
6. Balance loads and move them at a safe speed.

*Note:

Hazardous goods have the following characteristics:
1. Low-ignition temperature
2. Corrosive
3. Poison contamination
4. Susceptible to spontaneous combustion
5. Decomposition
6. Should be isolated from other hazardous goods

Flammable materials:
1. Store in well ventilated area
2. Admittance to storage area should be restricted to authorized personnel only
3. Isolate flammable goods

Acids:
1. Inspect for leaks, breaks, and any other damage to container
2. Use rubber gloves when handling
3. Keep acids away from water
4. Isolate acids
5. Glass storage containers recommended

Some chemicals are extremely corrosive or combustible when mixed together or if moisture is present.

References/Resources:

WAREHOUSING. Melvin Hatchett. Instructional Materials Services, University of Texas at Austin, 1974.

VTECS Warehouse Worker 46/61 Provide secure storage for goods which are classified as sensitive, hazardous flammable

DUTY AREA:
PERFORMING INVENTORYING ACTIVITIES

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Prepare Stock For Inventory

PERFORMANCE OBJECTIVE: Given merchandise in storage or on the selling floor, prepare the stock for inventory. All applicable items on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Arrange merchandise so it can be counted.
2. Update bin tickets.
3. Open partially filled containers, mark number of units on the outside and seal the container.
4. Gather all loose, single articles and stack or sort them for ease in counting.
5. Physically inspect merchandise and note old or damaged merchandise.

INSTRUCTOR CHECKLIST: Prepare Stock For Inventory

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Arranged merchandise to be counted?			
2. Updated bin tickets?			
3. Opened and counted contents of partially filled containers?			
4. Marked number of units on the outside and resealed partially filled containers?			
5. Gathered, stacked and/or sorted loose stock?			
6. Inspected merchandise and noted any problems?			

References/Resources:

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1969.

VTECS Fashion Salesperson 21/35 Take inventory

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Take Inventory

PERFORMANCE OBJECTIVE: Provided an inventory recording form, a calculator (optional), and designated merchandise to inventory, inventory the merchandise. All merchandise must be counted, mathematical computations must be correct and all entries must be legible.

PERFORMANCE GUIDE:

1. Prepare or obtain a master inventory list of items stocked showing:
   a. Name (Description of merchandise) and stock number
   b. Unit price
   c. Diagram of merchandise area
2. Conduct count:
   a. Count each item of merchandise and enter the count in the appropriate space on the master inventory list.
   b. Count loose and sorted items; write count on master list.
   c. For sealed boxes, write the count that is printed on the box.
   d. Refer to master inventory list to determine that all items of merchandise have been counted.
3. Extend inventory sheets: (optional)
   a. Multiply quantity times unit price.
   b. Calculate total cost per item of merchandise and enter on master inventory list.

References/Resources:

VTECS	Fashion Salesperson 21/35	Take inventory
	Hardware Salesperson 24/37	Take inventory
	Warehouse Worker 53/68	Conduct on-going physical inventory
	54/69	Conduct periodic physical inventory
IDECC	463/Mdse 26	Take physical inventory
	442/Mdse 28	Count stock for inventory
	414/Mdse 27	Know how to take a stock count for physical inventory
	466/Mdse 4	Prepare inventory control records and forms
	400/Mdse 3	Know the uses of inventory control forms and records
	401/Mdse 27	Know the purpose of stock counts
	470/05	Inventory forms

_X_ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Adjust Inventory Records

PERFORMANCE OBJECTIVE: Given a set of current inventory records (stock control records) and packing list/purchase orders; update and adjust inventory records on a regular basis for incoming and outgoing goods. Posting must be done daily, without error, and provide the following information: quantities on hand, on order, on backorder, and sold in any given period. Any stock irregularities must be corrected or reported to the appropriate personnel.

PERFORMANCE GUIDE:

1. Obtain list of all incoming goods.
2. Establish physical inventory schedule.
3. Re-inventory goods showing discrepancies.
4. Verify or adjust discrepancies (overages or shortages).
5. Prepare necessary input data for computer or hand adjustments to inventory records.
6. Update inventory records on a regular basis.

References/Resources:

VTECS Warehouse Worker 50/65

IDECC 466/Mdse 4 Prepare inventory control forms and records

400/Mdse 3 Know how to prepare inventory control forms and records

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Maintain And Update Stock Record Cards

PERFORMANCE OBJECTIVE: Given location directory, list of items ordered, list of merchandise received and issued maintain and update stock record cards.

PERFORMANCE GUIDE:

1. Obtain location directory, list of items on order, list of merchandise received, list of merchandise issued and stock record cards.
2. Record date and number of items received. Add number of items on hand and mumber of items received for new total of items on hand. (Formula A: number of items on hand + number of items received = new total items on hand)
3. Record date and number of items issued. Subtract number of items issued from number of items on hand. (Formula B: number of items on hand - number of items issued = new total items on hand)
4. Determine if re-order is necessary. (If Formula B is less than Formula A re-order is necessary)
5. Update stock record cards according to list of items ordered. Record the number of the order, date of the order and amount ordered.
6. Prepare stock record card for new merchandise by recording:
   - -Supplier name
   - -Name of Item
   - -Stock Number
   - -Storage Area Location
   - -Minimum, maximum and re-order point for the item
   - -Date, number of items received, and total on hand
7. File or re-file cards.

References/Resources:

PHYSICAL DISTRIBUTION: RECEIVING, SHIPPING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1969.

VTECS	Warehouse Worker 60/75	Post transaction data to stock control record cards
	Warehouse Worker 56/71	File stock record cards
IDECC	640/010	Stockkeeping forms and reports
	427/05	Unit inventory control systems (stock card records)

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Audit Stock Balance And Consumption Reports

PERFORMANCE OBJECTIVE: Given stock record cards, receipt and consumption reports, compare figures on cards against reports and correct any discrepancies found. All corrections must be without error, written legibly, and mathematically correct.

PERFORMANCE GUIDE:

1. Obtain reports.
2. Compare posted figures on stock record cards to receipt and consumption reports.
3. Identify discrepancies, write amended reports and reconcile with original report.

References/Resources:

VTECS Warehouse Worker 51/66 Audit stock balance and consumption reports

DUTY AREA:
PERFORMING SHIPPING ACTIVITIES

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Prepare Goods For Return To Manufacturer

PERFORMANCE OBJECTIVE: Provided merchandise, address label, packing filler, vendor address, charge-back forms/memorandum invoice, container, wrapping materials, shipping forms and scales, prepare merchandise for return to vendor. The merchandise must be packed to insure safe arrival; it must be securely wrapped and labeling must indicate complete address of sendor, receiver and method of shipment.

PERFORMANCE GUIDE:

1. Prepare merchandise return forms. (Charge-back forms or memorandum invoice).
2. Count goods.
3. Remove all store tags.
4. Pack and wrap merchandise for return to vendor:
    a. Choose a container, packing and wrapping material according to size and type merchandise to be returned.
    b. Pack container with merchandise to be returned and a copy of the charge-back form or memorandum invoice.
        - Cushion the merchandise with packing material on the bottom of box to absorb vibration using one or more of the following: shredded newspaper, styrofoam packing, confetti.
        - Wrap each item of merchandise, if necessary.
        - Place wrapped items of merchandise in the center of the carton and place packing material around and over them.
    c. Seal the package.
    d. Wrap the package, if necessary.
        1. position parcel on heavy wrapping paper
        2. wrap lengthwise
        3. tuck ends and make neat folds at corners
        4. secure with tape
5. Label/address container with vendor's and sender's name and address.
6. Weigh package.
7. Affix postage, if necessary.
8. Prepare shipping forms (bill of lading, return authorization document, etc.), if necessary.
9. Select shipping route and carrier and label package accordingly.
10. Calculate transportation charge.
11. Mail a separate copy of all forms to vendor.

References/Resources:

PHYSICAL DISTRIBUTION: SHIPPING, RECEIVING, STOCKING. Robert Luter. Instructional Materials Center, University of Texas at Austin, 1979.

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

VTECS	Fashion Salesperson 7/15	Pack and wrap merchandise for return to vendor
	Warehouse Worker 25/39	Prepare damaged goods and claims for reshipment
	Warehouse Worker 18/31	Address Packages/Cartons/Containers
	Warehouse Worker 19/32	Affix Postage, if necessary
	Warehouse Worker 59/74	Prepare Shipment Documents
IDECC	700/07	Pack or wrap merchandise for return to vendor
	366/Math 28	Determine transportation charges
	378/Math 28	Know shipping terminology
	359/Math 7	Compute postal and mail charges
VTECS	Warehouse Worker 22/35	Determine method of shipment

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Transfer Stock To Branch Stores

PERFORMANCE OBJECTIVE: Provided a transfer form, a request for transfer, and merchandise, transfer the stock. All required information (quantity, style, etc.) must be on the transfer form; stock must be as requested, prepared for transfer and delivered to designated area.

PERFORMANCE GUIDE:

1. Complete the transfer form for the merchandise that is to be transferred to another store:
    a. Date the form.
    b. Indicate where the merchandise is to be transferred.
    c. Record style and class number on the form.
    d. Write a description of the merchandise.
    e. Record the retail price of each piece of the merchandise and the total dollar amount.
    f. Record the number of items being transferred.
    g. Indicate the reason for transferring the merchandise, if necessary.
    h. Sign the transfer form.
    i. Have the transfer authorized.
    j. Adjust store inventory records.
2. Prepare the merchandise for transfer.
3. Take or request that the merchandise be taken to the shipping department for transfer.
4. Send paperwork to appropriate store employee.

*Note: Precautions that might be taken to avoid damage to merchandise being transferred to branch stores include:

Proper choice of boxes or wrapping.
Boxes must be carefully closed.
Items correctly wrapped.
Contents designated on the package.
Perishable goods properly marked.
Place fragile and crushable items on top.
Follow directions on boxes (this end up).
Load so that there will be a minimum of shifting during transit.

PERFORMANCE GUIDE (Cont.):

Use tools carefully.
Follow storage instructions (keep from freezing).
Don't throw cartons around.
Get help when moving heavy loads.
Don't let boxes build up on the loading docks.
Protect from rain or other water damage.

References/Resources:

VTECS	Fashion Salesperson 22/36	Transfer stock to branch stores
IDECC	698/08	Transfer stock
	445/Mdse 3	Record transfer of stock
	403/Mdse 30	Know procedures for recording transfer of stock

DUTY AREA:
PERFORMING STOCKING ACTIVITIES

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Obtain Goods From Stockroom Or Warehouse

PERFORMANCE OBJECTIVE: Given a list of merchandise needed, pull merchandise and move to proper department. The merchandise must be moved to the correct location without damage, while avoiding personal injury to the mover and fellow workers.

PERFORMANCE GUIDE:

1. Obtain and analyze the request for merchandise.
2. Determine location of goods.
3. Secure necessary materials handling equipment.
4. Pull merchandise and move to the proper department.
5. Choose equipment according to weight and size of goods to be moved.
6. Balance the load.
7. Get help if needed.
8. Plan your move.

*Note: The following safety factors must be followed:
  a. Properly store materials handling materials when not in use.
  b. When moving any merchandise, watch for oily and grease spots, and be careful when going around corners.
  c. Use equipment for the purpose it has been desinged.
  d. Do not overload.
  e. Do not leave goods or equipment in corridors.
  f. Wear gloves if moving sharp objects.

References/Resources:

VTECS Warehouse Worker 24/38 Obtain goods from stockroom or warehouse

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
___ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Deliver Goods To Proper Department

PERFORMANCE OBJECTIVE: Given requisition orders, goods to be delivered, materials handling equipment, and location transfer forms, identify and deliver the merchandise to the requested location. When delivery has been completed there must be no damage to the merchandise, it must be delivered to the correct location and there must be no injury to the materials handler or fellow workers.

PERFORMANCE GUIDE:

1. Identify goods to be delivered.
2. Locate goods.
3. Identify destination of goods.
4. Pull merchandise.
5. Wear gloves if handling sharp or slippery materials.
6. Choose proper handling equipment according to size and weight of goods to be moved.
7. Do not overload/balance the load.
8. Move goods at a safe speed.
9. Return handling equipment to proper area.
10. Deliver goods to assigned location.
11. Complete location/transfer reports.

References/Resources:

VTECS Warehouse Worker 55/70 Deliver goods to proper location

___ Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Check In Merchandise Received From Stockroom

PERFORMANCE OBJECTIVE: Provided an order of merchandise, an invoice and a copy of the order sheet, check in the order. When finished, the actual count of merchandise must be recorded next to each item on the invoice and the order sheet, a note of any damages or discrepancies must be recorded on the invoice and the order sheet, and the retail price of each item must be verified and corrected if necessary.

PERFORMANCE GUIDE:

1. Read the invoice to determine:
    a. Quantity of merchandise requested
    b. Sizes requested
    c. Styles requested
    d. Color requested
2. Check all merchandise received:
    a. Count the number of each item of merchandise received and write the actual count beside the count that appears on the invoice and the order sheet.
    b. If premarked, check price tag to determine that correct price is recorded on the tag.
    c. Check the condition of the merchandise.
    d. Write a description of any damages on the invoice and the order sheet and return the item to the stockroom. (Attach a note of damages to item of merchandise, if applicable.)
    e. Record any other discrepancies on the invoice and the order sheet.
    f. Initial invoice and order sheet and route them to appropriate store employee.

References/Resources:

VTECS	Fashion Salesperson 1/8	Check count of merchandise received from stockroom.
IDECC	708/05	Check in merchandise against the invoice
	638/05	Know procedures for checking in merchandise against the invoice
	701/04	Determine shipping and receiving discrepancies
	641/05	Know receiving bookkeeping procedures
	647/05	Know receiving terminology.
VTECS	Fashion Salesperson 2/9	Check merchandise and retail price against copy of the order sheet

_X_ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Price Mark Merchandise

PERFORMANCE OBJECTIVE: Provided merchandise price tickets, a price-marking machine (marking tools), price ticket fasteners, and retail price list, price mark each item of merchandise. Each price ticket must be marked clearly with the correct price and store information and fastened securely to the merchandise.

PERFORMANCE GUIDE:

1. Choose price tickets suitable for merchandise to be marked.
2. Gather merchandise, price tickets and fasteners.
3. Obtain retail price list and any other information to be printed on the price ticket. (Cost-price code, season/date code, style number, size, color, fiber content, department code, manufacturer's code number) (Calculate markup if necessary)
4. Count merchandise to determine how many price tickets to print.
5. Operate price marking machine. (optional)
6. Hand-print price tickets. (optional)
7. Attach price tickets to merchandise.
8. Attach shoplifting detection wafer. (optional)
9. Inspect prices on merchandise for accuracy, count merchandise and compare the count to the number that appears on the purchase order or invoice.
10. Route/move merchandise to the selling floor or reserve stock area.
11. Return the invoice or purchase order to the appropriate store employee.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

VTECS	Fashion Salesperson 13/25	Affix prices on merchandise
IDECC	396/Mdse 38	Know pricing policies and price line structure
	710/09	Operate price marking equipment
	644/09	Know how to operate price marking equipment
	709/09	Attach price tickets to merchandise
	645/09	Know how to put price tickets on merchandise
	641/05	Know price marking bookkeeping procedures
	647/05	Know price marking terminology
	364/Math 27	Calculate markup
	428/Mdse 5	Know the uses of tickets stubs and forms to keep records of merchandise sold by classification

___ Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Shelve Merchandise

PERFORMANCE OBJECTIVE: Provided merchandise, a price list, display props/fixtures, stocking tools and supplies, stock the merchandise. When finished, all of the merchandise must be price marked, visible to customers, in related groups and displayed according to kind, color, and size.

PERFORMANCE GUIDE:

1. Assemble tools and supplies:
    a. Box cutter/or other appropriate opening tools.
    b. Price tags
    c. Price markers
    d. Price list
    e. Dust cloth/feather duster
2. Avoid placing boxes, tools and supplies in customer traffic area.
3. Open boxed merchandise with appropriate tool.
4. If necessary, clean/dust the merchandise.
5. Price-mark each item of merchandise before placing it on fixture/prop. If merchandise is prepriced check the price ticket against the price list for accuracy. Check for price agreement with previously stocked items.
6. Check shelf allocation, if applicable.
7. Clean fixture/prop, if necessary.
8. Rotate stock.
9. Stock like merchandise according to color, size and kind.
10. When stocking shelves and counters, place merchandise so that it is secure and will not fall.
11. Stock easily pilfered items in lockable props/fixtures.
12. Clean up and dispose of all packing material.
13. Return tools to storage area.

References/Resources:

VTECS	Fashion Salesperson 12/24	Stock merchandise
	Hardware Salesperson 23/36	Stock shelves
IDECC	838/S24	Know how to stock merchandise
	504/PS19	Know how to stock merchandise
	615/02	Know stocking safety procedures
	840/S23	Know housekeeping duties performed for stock care
	908/S25	Rotate Stock
	878/S26	Locate and refill Low Stock items
	881/S27	Locate and arrange reserve stock (replenish floor stock from reserve stock)
VTECS	Cashier Checker 36/105	Stock merchandise on racks and shelves

___ Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Count Stock To Be Advertised

PERFORMANCE OBJECTIVE: Given a request for a stock count of merchandise to be advertised, locate and count the merchandise. The count must be accurate and the information returned to the requesting store department.

PERFORMANCE GUIDE:

1. Obtain a list of merchandise to be advertised.
2. Identify/locate merchandise to be advertised.
3. Prepare for count of designated merchandise:
    a. Arrange merchandise so it can be counted.
    b. Open partially filled containers, count the contents, mark the number on the outside and seal the container.
    c. Gather all loose, single items and stack or sort for ease in counting.
    d. Inspect merchandise and note any damages or signs of age.
4. Conduct count:
    a. Count each item of merchandise and record count.
    b. Count loose and sorted items and record count.
    c. For sealed boxes, write the count that is printed on the box.
    d. Refer to the list of merchandise to determine that all merchandise has been counted.
5. Forward merchandise count to supervisor.

References/Resources:

VTECS Fashion Salesperson 21/35

IDECC 014/Adv 2   Count stock to be advertised

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Change Prices On Merchandise

PERFORMANCE OBJECTIVE: Provided price marking tools and supplies, a price change list and merchandise, change the prices on the merchandise. When completed, each item of merchandise on the price change list must be correctly and legibly price marked.

PERFORMANCE GUIDE:

1. Assemble price marking tools, supplies and price list:
   - -price change list
   - -price tickets
   - -fasteners
   - -price marking machine
   - -price re-marking machine
   - -pens or markers
2. Determine type of re-marking. (new ticket, clip old price and show new price, show both old and new price)
3. If mark-down is indicated by price change list, slash through the original price with a pen and write the indicated new price or operate the price re-marking machine.
4. If mark-up is indicated by the price change list, count the number of items and make new price tags with indicated new prices.
5. Remove old price tags from merchandise, if necessary.
6. Attach new price tickets, if necessary.
7. Inspect prices for accuracy.
8. Record price changes in the price books (optional).

*Note: Price mark-up should be done in storage area.

References/Resources:

THE RECEIVING, CHECKING, MARKING, STOCKING CLERK. Carol Moffett and Rebecca Hawkins. 2nd ed. Gregg Division, McGraw-Hill Book Co., 1980.

VTECS	Fashion Salesperson 14/27	Change prices on merchandise
	Hardware Salesperson 4/16	Record merchandise price changes in price books
IDECC	444/Mdse 40	Change prices on merchandise
	406/Mdse 40	Know methods/procedures for changing prices up or down
	426/Mdse 40	Know the procedures for recording price changes

DUTY AREA:
PERFORMING DISPLAYING ACTIVITIES

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Design Point-Of-Purchase Signs

PERFORMANCE OBJECTIVE: Provided merchandise and a point-of-purchase sign request form, design a sign for the merchandise. The plan for the sign should include information that will benefit customers and a message that is brief, factual and will attract the customer's attention.

PERFORMANCE GUIDE:

1. Analyze the merchandise. Determine what customer benefits it offers:
   - -Pleasure
   - -Comfort
   - -Protection
   - -Time or labor savings
   - -Money savings
   - -Appearance improvements
   - -Pride of ownership
   - -Security
2. Write the name of the product.
3. Write a list of the selling features of the product:
   a. Materials of which it is made
   b. How is it made
   c. How it is superior
   d. How can it be used
   e. Its care features
   f. Its new uses
4. Write the price of the product.
5. Give the point-of-purchase sign request form to the print shop.

References/Resources:

VTECS	Fashion Salesperson 3/10	Design point-of-purchase signs
IDECC	227/D31	Design and letter signs
	181/D17	Know how to design and letter signs
	217/D29	Develop display signs
	195/D29	Know how to develop display signs

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Letter Signs

PERFORMANCE OBJECTIVE: Given a display and access to show card lettering tools and supplies, letter a show card for the display. The show card must be sized and color coordinated appropriately for the display. It must incorporate the principles of artistic design, must be informative and readable and placed on the display in a location where it promotes customer interest.

PERFORMANCE GUIDE:

1. Write a plan for the show card including the following:
   a. The selling features of the item and service
   b. The size and color of the card that is to be used
   c. The style of lettering that is to be used
   d. The copy that is to be lettered on the show card
2. Assemble the tools and materials that will be needed for lettering the show cards at the work area:
   a. Lettering ink or paint
   b. Ruler and square
   c. Show card stock
   d. Lettering pens or brushes
   e. Pencils
3. Determine the size of show cards that is needed.
4. Line off the show card stock with a hard lead pencil.
5. Lay out the show card in a size proportionate to the display and incorporate the following principles of design:
   a. Balance
   b. Unity
   c. Harmony
   d. Scale and proportion
6. Letter the card:
   a. Select style of lettering that will be easy for customers to read and is an appropriate contrast to background material.
   b. Write a copy that is factual, direct and to the point.
   c. Avoid including unnecessary words and distracting material.
   d. Select lettering colors that will contrast with the card stock.
   e. Letter the cards. Avoid ink or paint smears, fingerprints, cuts and tears.
7. Display the show card in a location on the display where it will promote customer interest in the merchandise or service.

References/Resources:

VTECS	Fashion Salesperson 6/13	Letter Signs
	Flowershop Salesperson 8/19	Design and letter show cards
IDECC	227/D31	Design and letter signs
	181/D17	Know how to design and letter signs

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

__ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Set Up Manufacturer's Displays

PERFORMANCE OBJECTIVE: Given a manufacturer's display and access to tools and display space, set up the display. The finished display must compare with the manufacturer's illustration, all items of merchandise must be price marked, and the display must be set up so that it will not fall under the weight of the merchandise.

PERFORMANCE GUIDE:

1. Read the manufacturer's instructions for setting up the display.
2. Assemble the necessary tools.
3. Construct the display prop according to manufacturer's instructions at the work area.
4. Move the prop to the display area.
5. Inspect and assemble the merchandise to be put on display prop.
6. Assemble price-marking tools and supplies.
7. Clean prop and merchandise.
8. Price-mark merchandise as it is placed on prop.
9. Dispose of debris.
10. Put tools into storage.

References/Resources:

VTECS	Fashion Salesperson 9/19	Set up manufacturers' display
	Retail Flowershop Salesperson 13/39	Set up manufacturers' display
IDECC	221/D26	Use manufacturers' display aids
	188/D13	Know how to use manufacturers' display aids

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

___ Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Set Up Counter Displays

PERFORMANCE OBJECTIVE: Provided merchandise, display space, display tools and equipment, set up a counter display. The finished display must meet all applicable criteria on the instructor's checklist.

PERFORMANCE GUIDE:

1. Write a plan for the display including:
   a. The theme or purpose
   b. Merchandise to be used
   c. Display accessories to be used
   d. Show/price cards to be used
   e. Tools and supplies to be used
2. Draw a sketch of how the display will appear when finished.
3. Letter or order printed show and price cards.
4. Assemble tools, merchandise, props, and accessories at the work area.
5. Set up the display incorporating the following principles of display:
   a. Balance
   b. Harmony
   c. Color and texture
   d. Scale and proportion
   e. Shape
   f. Focal area
   g. Repetition
   h. Unity
6. Incorporate the following safety standards in the display:
   a. Use props that will safely support all displayed merchandise.
   b. Place all merchandise so that no hazards exist.
   c. Place all electrical and lighting fixtures so that all safety requirements are met.
   d. Use only fire-resistant accessory materials in the display.
   e. Avoid placing display in an area that will block exits or entrances.
   f. Avoid having any sharp edges and corners in the display.

PERFORMANCE GUIDE (Cont.):

7. Set up a display which:
    - a. Avoids the use of lighting or other display techniques that will present a false impression of the merchandise.
    - b. Has only fresh and clean merchandise, props and accessories.
    - c. Has a definite theme or purpose.
    - d. Includes show and price cards that are informative, free of errors, dirt, smudges and that follow the purpose or theme of the display.
8. Dispose of all debris.
9. Return tools and materials to storage area.

INSTRUCTOR CHECKLIST: Set Up Counter Displays

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
The display: 1. Attracted the attention of customers?			
2. Exhibited the principles of display?			
3. Exhibited the following safety standards: a. Props were structually designed to safely support displayed merchandise? b. Placement of merchandise was arranged so that			
no safety hazards existed? c. Lighting or other electrical fixtures were placed to meet all safety requirements? d. Flammable materials used in display were fire			
resistant as far as possible? e. Display was not located in an area where it would block exits or entrances? f. Display was free of sharp edges and corners?			
4. Included clean and fresh merchandise?			
5. Was designed around a definite theme or purpose?			
6. Included showcards or price tags that were informative, free of errors, dirt, smudges, and followed the purpose or theme of the display?			
7. Disposed of all debris?			
8. Returned tools and materials?			

References/Resources:

VTECS	Fashion Salesperson 8/16	Set up counter display
	Retail Flowershop Salesperson 9/23	Set up counter display
IDECC	205/D32	Build counter display
	230/D25	Use various types of display arrangements
	190/D7	Know different types of display arrangements
	178/D7	Know different types of display arrangements
	231/D26	Use various types of display fixtures
	174/D13	Know types of display fixtures
	228/D24	Use principles of color, harmony, balance and proportion
	179/D10	Know how to use principles of color, balance and proportion
	225/D30	Use price cards
	180/D17	Know how to use price cards
	209/D32	Build displays of merchandise as it can be used
	191/D7	Know how to build displays of merchandise as it can be used
	203/D32	Know display building techniques
	201/D32	Know how to use cartons, boxes and cases in building displays
	218/D28	Adjust display lighting
	185/D16	Know how to adjust display lighting
	894/S29	Display merchandise
	805/S29	Know how to display merchandise
	176/D15	Prepare merchandise for display

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing. Gregg Division, McGraw-Hill Book Company.

____ Receiving Clerk 222.387-050
__X__ Stock Clerk 299.367-014
222.387-058
__X__ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Dress Mannequins

PERFORMANCE OBJECTIVE: Provided a mannequin, clothing, accessories, tools and equipment, dress the mannequin. The mannequin must be dressed and accessorized appropriately without damaging any of its parts or the merchandise.

PERFORMANCE GUIDE:

1. Remove wig, or if wig cannot be removed, cover it with a plastic bag.
2. Unlock and remove detachable arms.
3. Disassemble torso from lower half of mannequin; remove the stand from lower half of body.
4. Turn lower half up-side down and put on hose.
5. Slip slacks over lower half of mannequin (if applicable).
6. Place shoes on feet and fasten.
7. Place lower half on support rod and fasten set screws.
8. Reattach torso of mannequin to lower half, taking care to avoid damage to slacks. Lock torso into position.
9. Place unbottoned sweater/blouse/shirt on torso.
10. Place unbottoned dress/coat on mannequin.
11. Slip arms up sleeve of garments and securely lock into position.
12. Button all garments beginning with the inner most item.
13. Select a complementary wig and/or scarf and put in place.
14. Add hat, bracelets, necklaces, other accessories.
15. Check for loose threads, tickets or wrinkles which may detract from display.

References/Resources:

VTECS Fashion Salesperson 5/12 Dress mannequins

IDECC 217/D26 Dress mannequin

193/D13 Know how to dress mannequin

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

☐ Receiving Clerk 222.387-050
☒ Stock Clerk 299.367-014
222.387-058
☒ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Set Up Window Displays

PERFORMANCE OBJECTIVE: Given merchandise, window display space, tools and materials, set up a window display. The finished display must meet all applicable criteria on the instructor's checklist.

PERFORMANCE GUIDE:

1. Write a plan for the display including:
   a. The theme or purpose
   b. Merchandise to be used
   c. Display accessories to be used
   d. Show/price cards to be used
   e. Tools and supplies to be used
2. Draw a sketch of how the display will appear when finished.
3. Letter or order printed show/price cards.
4. Assembled tools, merchandise, props and accessories at the work area.
5. Set up the display incorporating the following principles of display:
   a. Balance
   b. Harmony
   c. Color and texture
   d. Scale and proportion
   e. Shape
   f. Focal area
   g. Repetition
   h. Unity
6. Incorporate the following safety standards when building the display:
   a. Keep in mind that you are surrounded by glass and avoid any moves that will cause it to break.
   b. Use props to safely support all displayed merchandise.
   c. Place all electrical and lighting fixtures so that all safety requirements are met.
   d. Use only fire-resistant accessory materials in the display.
7. Avoid the use of lighting or other display techniques that will present a false impression of the merchandise.
8. Set up the display to include show and price cards that are informative, free of errors, dirt, smudges, and that follow the purpose or theme of the display.

PERFORMANCE GUIDE (Cont.):

9. To set up the display:
    - a. Clean the window display area including the glass and floor area.
    - b. Assemble the merchandise, tools, props and accessories.
    - c. Set up window display background.
    - d. Set up the display props.
    - e. Place merchandise on the display props and in the window display space.
    - f. Set up accessory lighting fixtures.
    - g. Set in show and price cards.
    - h. Dispose of all debris.
    - i. Return tools to work area.

INSTRUCTOR CHECKLIST: Set Up Window Displays

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
The display: 1. Attracted the attention of customers?			
2. Exhibited the following principles of display?			
3. Exhibited the following safety standards: a. Props were structually designed to safely supported displayed merchandise?			
b. Placement of merchandise were arranged so that no safety hazards existed? c. Lighting or other electrical fixtures were placed to meet all safety requirements? d. Flammable materials used in display were fire resistance?			
4. Did not include lighting or other display techniques that deliberately presented a false impression of the merchandise?			
5. Included merchandise in the display that was clean and fresh?			
6. Was designed around a definite theme or purpose?			
7. Included showcards or price tags that were informative, free of errors, dirt, smudges, and followed the purpose or theme of the display?			
8. Disposed debris?			
9. Returned tools and materials?			

References/Resources:

VTECS Fashion Salesperson 10/20 Set up window displays

IDECC	230/D25	Use various types of display arrangements
	190/D7	Know how to use various types of display arrangements
	178/D7	Know how to use various types of display arrangements
	231/D26	Use various types of display fixtures
	174/D13	Know types of display fixtures
	228/D24	Use principles of color, harmony, balance and proportion
	179/D10	Know how to use principles of color, harmony, balance and proportion
	225/D30	Use price cards
	180/D17	Know how to use price cards
	209/D32	Build display of merchandise as it can be used
	191/D7	Know how to build display of merchandise as it can be used
	203/D32	Know display building techniques
	201/D32	Know how to use carton, boxes and cases in building displays
	218/D28	Adjust display lighting
	185/D16	Know how to adjust display lighting
	206/D32	Build window display
	894/S29	Display merchandise
	805/S29	Know how to display merchandise
	224/D26	Construct display fixtures and backgrounds
	215/D26	Construct display fixtures and backgrounds
	226/D27	Construct display fixtures and backgrounds
	183/D13	Know how to construct display fixtures
	182/D14	Know how to construct display fixtures
	176/D15	Prepare merchandise for display

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Set Up Mass Display

PERFORMANCE OBJECTIVE: Provided merchandise, display space, display tools and equipment, set up a mass display. The finished display must meet all applicable criteria on the instructor's checklist.

PERFORMANCE GUIDE:

1. Write a plan for the display including:
    a. The theme or purpose
    b. Merchandise to be used
    c. Display accessories to be used
    d. Show/price cards to be used
    e. Tools and supplies to be used
2. Draw a sketch of how the display will appear when finished.
3. Letter or order printed show and price cards.
4. Assemble tools, merchandise, props, and accessories at the work area.
5. Set up the display incorporating the following principles of display:
    a. Balance
    b. Harmony
    c. Color and texture
    d. Scale and proportion
    e. Shape
    f. Focal area
    g. Repetition
    h. Unity
6. Incorporate the following safety standards in the display:
    a. Use props that will safely support all displayed merchandise
    b. Place all merchandise so that no hazards exist.
    c. Place all electrical and lighting fixtures so that all safety requirements are met.
    d. Use only fire-resistant accessory materials in the display.
    e. Avoid placing display in an area that will block exits or entrances
    f. Avoid having any sharp edges and corners in the display.
    g. Keep part of aisle clear for customer traffic
    h. Build display to prevent toppling and customer bumping.

PERFORMANCE GUIDE (Cont.)

7. Set up a display which:
    a. Avoids the use of lighting or other display techniques that will present a false impression of the merchandise
    b. Has only fresh and clean merchandise, props and accessories
    c. Has a definite theme or purpose
    d. Includes show and price cards that are informative, free of errors, dirt, smudges and that follow the purpose or theme of the display
    e. Has merchandise that is easy to reach
8. Dispose of all debris.
9. Return tools and materials to storage area.

*Note:

1. Large amounts of merchandise are displayed.
2. Similar or related items are often displayed with no spacing between groupings.
3. Spacing is made by grouping merchandise by type.
4. Merchandise size and form is used to give a separate appearance.
5. Merchandise can be arranged in the following ways:
    -single item arrangement
    -multiple item arrangement
    -jumble arrangement.
6. Items in mass display have high volume sales potential.
7. Mass displayed items suggest buying to customers.
8. Mass display often suggests sale or special promotion items.

INSTRUCTOR CHECKLIST: Set Up Mass Display

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
The display: 1. Attracted the attention of customers?			
2. Exhibited the principles of display?			
3. Exhibited the following safety standards: a. Props were structually designed to safely support displayed merchandise? b. Placement of merchandise was arranged so that			
no safety hazards existed? c. Lighting or other electrical fixtures were placed to meet all safety requirements? d. Flammable materials used in display were fire			
resistant as far as possible? e. Display was not located in an area where it would block exits or entrances? f. Display was free of sharp edges and corners?			
4. Included clean and fresh merchandise?			
5. Was designed around a definite theme or purpose?			
6. Included showcards or price tags that were informative, free of errors, dirt, smudges, and followed the purpose of theme of the display?			
7. Disposed of all debris?			
8. Returned tools and materials?			

References/Resources:

IDECC 216/D32	Build mass display
189/D7	Know principles of mass display
230/D25	Use various types of display arrangements
190/D7	Know different types of display arrangements
178/D7	Know different types of display arrangements
231/D26	Use various types of display fixtures
174/D13	Know types of display fixtures
228/D24	Use principles of color, harmony, balance and proportion
179/D10	Know how to use principles of color, balance and proportion
225/D30	Use price cards
180/D17	Know how to use price cards
209/D32	Build displays of merchandise as it can be used
191/D7	Know how to build displays of merchandise as it can be used
203/D32	Know display building techniques
201/D32	Know how to use cartons, boxes and cases in building displays
218/D28	Adjust display lighting
185/D16	Know how to adjust display lighting
894/S29	Display merchandise
805/S29	Know how to display merchandise
176/D15	Prepare merchandise for display

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

___ Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Tidy Up Displays

PERFORMANCE OBJECTIVE: Provided displays, cleaning equipment, tools and materials, tidy up the displays. When finished all displays must be full; glass surfaces must be clean and polished; merchandise must be replenished, resized, restacked, and fronted. All rules of safety must be followed.

PERFORMANCE GUIDE:

1. Assemble cleaning tools and equipment:
   a. Vacuum cleaner
   b. Dust rags
   c. Feather duster
   d. Glass cleaner
   e. Rags for cleaning glass
   f. Squeegee
2. Inspect displays and complete the steps necessary to tidy them up:
   a. Dust
   b. Clean glass
   c. Add merchandise
   d. Restack merchandise
   e. Resize merchandise
   f. Front merchandise
   g. Clean props or fixtures
   h. Replace price tags or labels
   i. Replace merchandise in dust covers
   j. Dust shelves
3. Follow safety rules when cleaning:
   a. Avoid bumping display glass with body and tools
   b. Read and follow precautions printed on labels of cleaning agents
   c. Keep cleaning equipment, and materials away from customer traffic areas
   d. Immediately wipe up spills of cleaning liquids

References/Resources:

VTECS Fasion Salesperson 11/23 Tidy up displays

IDECC 207/D53 Rearrange or replace display items

177/D8 Clean and straighten display

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Dismantle Display

PERFORMANCE OBJECTIVE: Provided tools, cleaning equipment and an assembled display, dismantle the display. The display must be dismantled safely without damage to merchandise, props or accessories; all merchandise must be returned to the appropriate department; all display props must be returned to storage; and display area must be left neat and clean.

PERFORMANCE GUIDE:

1. Assemble tools and cleaning materials.
2. Adhere to following safety rules:
   a. Avoid bumping glass of window display area
   b. Avoid placing removed props, and merchandise in aisles or where entrances/exits will be blocked
   c. Handle all tools safely
   d. Obtain help when removing heavy objects
3. Dismantle display:
   a. Remove signs/show cards
   b. Remove accessory lighting fixtures
   c. Remove merchandise
   d. Remove props
   e. Remove backdrop
4. Return merchandise to department.
5. Return props, display materials, show cards and signs to storage.
6. Perform housekeeping activities:
   a. Clean windows
   b. Vacuum floor
   c. Dust props/fixtures
   d. Throw out all trash

References/Resources:

VTECS Fashion Salesperson 4/11 Dismantle display

IDECC 211/D8 Dismantle display

192/D8 Store display materials

Display and Promotion, 2nd edition. Occupational Manuals and Projects in Marketing Series. Gregg Division, McGraw-Hill Book Company.

DUTY AREA:
PERFORMING STORE OPERATING ACTIVITIES

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Open Store

PERFORMANCE OBJECTIVE: Provided a store and keys, open the store for a business day. Before opening, observations must be made to determine that no forced entry was made, alarm system was turned off, and that all entries are secure.

PERFORMANCE GUIDE:

1. Observe to determine that no one is loitering around the premises before unlocking the door.
2. Check to determine that there are no signs of forced entry before opening the door. Report any observed forced entry immediately to police. Do not move anything if there is any evidence of forced entry.
3. Unlock front door.
4. Turn off alarm system.
5. Observe to determine that windows and other entries are secure.
6. Proceed with assigned duties; for example:
   a. Turn on lights.
   b. Adjust thermostat.

References/Resources:

VTECS Fashion Salesperson 41/57 Open Store

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Prepare Check-Out Area For Business Day

PERFORMANCE OBJECTIVE: Provided a check-out area and supplies, prepare the area for the business day. All the steps on the instructor's checklist must be performed acceptably.

PERFORMANCE GUIDE:

1. Clean cash register.
2. Check tape supply in register.
3. Replenish bag supply.
4. Dust shelves and merchandise in assigned area.
5. Clean check-out area.
6. Clean display props.
7. Remove all items from conveyor.
8. Return unsold merchandise which has collected on checkstand to stock.

INSTRUCTOR CHECKLIST: Prepare Check-Out Area For Business Day

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Cleaned cash register?			
2. Checked tape supply in cash register?			
3. Replenished supply of bags?			
4. Dusted merchandise and shelves in check-out area?			
5. Cleaned check-out area?			
6. Cleaned display props?			
7. Removed all items from conveyor?			
8. Returned unsold merchandise to stock?			

References/Resources:

VTECS Cashier Checker 28/87 Prepare check-out area for business day

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Prepare Cash Drawer

PERFORMANCE OBJECTIVE: Given a cash drawer, change fund and a change fund receipt form, prepare the cash drawer for business. All the steps on the instructor's checklist must be acceptably completed.

PERFORMANCE GUIDE:

1. Count money received.
2. Fill out and sign receipt form showing amounts of each denomination and total amount of cash received.
3. Place change fund into appropriate sections in cash drawer.

INSTRUCTOR CHECKLIST: Prepare Cash Drawer For Daily Business

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/
1. Counted and receipted change fund?			
2. Filled out and signed cash receipt form listing the amounts of each denomination and total amount of cash received?			
3. Placed change fund into appropriate sections in cash drawer?			

References/Resources:

VTECS Cashier Checker 5/13 Prepare cash drawer for daily business

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Fill Out Credit Application Form

PERFORMANCE OBJECTIVE: Provided a credit application form and a customer who wishes to apply for credit, fill out the form. The application information must be written legibly, all requested information completed, and the application must be signed by the applicant.

PERFORMANCE GUIDE:

1. Greet the customer (applicant).
2. Determine the customer's needs.
3. Obtain a credit application form.
4. Explain to the applicant that the credit application form must be completed before credit can be authorized.
5. Explain the store's policy concerning the waiting period before credit is approved.
6. Explain to the applicant that she/he can complete the credit application form or that you will be glad to assist them with filling it out.
7. Ask the applicant for the following information:
   a. Full name and name of spouse
   b. Current address
   c. Previous address
   d. Occupation
   e. Bank references
   f. Credit references
   g. Applicant's social security number
   h. Names of persons authorized to use the credit account
8. Request that the applicant sign the credit application.
9. Explain to the applicant that notification of approval will be forthcoming.
10. Thank the applicant.
11. Route the application to the store's credit department.

References/Resources:

VTECS	Fashion Salesperson 18/31	Fill out credit application form
IDECC	134/Com 23	Assist customer fill out credit application form
	525/PS1	Know procedures for obtaining a credit card
	601/021	Know how to interpret credit policies

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Receipt Customer's Accounts Receivable

PERFORMANCE OBJECTIVE: Provided a receipt form and information concerning amounts due on a charge account, fill out the receipt form. The receipt form must be completed legibly and accurately to include all requested information.

PERFORMANCE GUIDE:

1. Legibly write the customer's name on the receipt form.
2. Legibly write the customer's full address on the receipt form.
3. Legibly write the date of the transaction on the receipt form.
4. Legibly place a check in the received-on-account box printed on the receipt form.
5. Legibly write the total amount paid in the amount column.
6. Sign the receipt form.
7. Hand the customer their copy of the receipt form.
8. Retain store copy.

References/Resources:

VTECS	Cashier Checker 1/1	Accept and receipt customer's accounts receivable
IDECC	680/019	Receive and record customer payment of bills
	600/019	Know how to handle customer payment of bills
	595/019	Know billing procedures

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Balance Cash Register

PERFORMANCE OBJECTIVE: Provided a cash register with a day's receipts and transaction forms in the cash drawer, a daily balance form and money bags, close out the cash register. When completed, required information must be accurately recorded on the daily balance form, and the specified amount of change must be left in the cash drawer.

PERFORMANCE GUIDE:

1. Insert the daily balance form into the cash register according to manufacturer's instructions.
2. Take a cash register reading.
3. Count and record the amount of coins and currency in the cash drawer.
4. Total and record the amount of checks in the cash drawer.
5. Count out a sufficient amount of coins and bills for use as the next days' change fund, and subtract this total from total cash. Enter this on the daily balance form as "cash in the drawer."
6. Place all cash and checks in the money bag.
7. Add all paid-outs and cash refunds and subtract this total from the cash total to obtain cash received total.
8. Compare total cash received with the audit strip reading to determine if register is "cash proved," "cash over," or "cash short."
9. Insert all monies, daily balance form, checks, overrings, underrings, voids, refunds and paid-outs into the money bag and send it to the accounting department.
10. Leave cash drawer open. (optional)

References/Resources:

VTECS	Fashion Salesperson 16/29	Close out cash register
	Cashier Checker 7/19	Close out cash register
	Hardware Salesperson 1/13	Balance cash drawer against register reading
IDECC	361/Math 16	Balance the cash register
	389/Math 17	Balance the cash register
	633/014	Balance cash register
	636/014	Prepare daily sales sheet

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Close Out Department

PERFORMANCE OBJECTIVE: Provide a department with merchandise and a cash register, "close-out" the department.

PERFORMANCE GUIDE:

1. Balance cash register.
2. Re-set cash register.
3. Turn in change fund and day's receipts.
4. Prepare daily report form.
5. Leave the register as instructed (drawer partially opened, drawer closed).
6. Straighten department.
7. Empty waste paper.
8. Shut drawers.
9. Turn off electrical appliances, if applicable.
10. Cover merchandise, if applicable.
11. Turn on security precautions.
12. Shut off lights.

INSTRUCTOR CHECKLIST: Close Out The Department

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Balanced cash register?			
2. Re-set cash register?			
3. Turned in change fund and day's receipts?			
4. Prepared daily report form?			
5. Left the register as instructed (drawer partially opened, drawer closed)?			
6. Straightened department?			
7. Emptied waste paper?			
8. Shut drawers?			
9. Turned off electrical appliances, if applicable?			
10. Covered merchandise, if applicable?			
11. Turned on security precautions?			

INSTRUCTOR CHECKLIST (Cont.)

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
12. Shut off lights?			

References/Resources:

IDECC 632/014 "Close-out" the department

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Fill Out Bank Deposit Forms

PERFORMANCE OBJECTIVE: Given a bank deposit form, checks, change, currency, and an adding machine, fill out the deposit form. All checks, currency and change must be listed and totaled without error and all identifying information must be correctly entered on the deposit form.

PERFORMANCE GUIDE:

1. Assemble deposit slip, checks, currency, coins, and adding machine at work area.
2. Count coins and write total in appropriate space on deposit slip.
3. Count currency and write total in appropriate space on deposit slip.
4. Endorse all valid checks.
5. Calculate total of all checks.
6. List each check by number and amount in appropriate space.
7. Enter total of checks on the face of the deposit slip.
8. Add totals of currency, coins, and checks and enter in appropriate space on deposit slip.
9. Write the following information on the face of the deposit slip in the appropriate spaces:
   a. Name of the above
   b. Address
   c. Account number
   d. Date

References/Resources:

VTECS Fashion Salesperson 17/30 Fill out bank deposit forms

Hardware Salesperson 21/14 Prepare bank deposit forms

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Close Store

PERFORMANCE OBJECTIVE: Provided a store and a key, close the store. When finished, all people must be out of the store, doors and windows must be locked, and security lights and alarm system must be on.

PERFORMANCE GUIDE:

1. Walk the store and check the following areas to determine that the store is secure:
    a. Elevators
    b. Doors leading to the outside
    c. All departments to determine that all people are out of the store
    d. Stairs and stairwells
    e. Restrooms
    f. Windows
    g. Dressing room
2. Turn on security lights, or check to determine that they have been turned on.
3. Turn on alarm system or check to determine that it has been turned on.
4. Check outside area of store, if making night deposit, to determine that no one suspicious is standing near by.
5. Close and lock door.
6. Double check to determine that door is securely locked.

References/Resources:

VTECS Fashion Salesperson 40/56 Close store

X Receiving Clerk 222.387-050
X Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Detect And Report Shoplifting And Pilferage

PERFORMANCE OBJECTIVE: Provided a shoplifting situation, detect and report the incident. Following the incident, reasons for suspecting shoplifting must be reported and store policy for handling must be followed.

PERFORMANCE GUIDE:

SHOPLIFTING:
1. Follow store policy in detecting and reporting shoplifting.
2. Immediately greet all customers as they enter department/store, if applicable.
3. Watch as customers browse or shop department.
4. Observe for characteristics such as:
   a. Customers who carry large shopping bags
   b. Customers who exhibit nervous movement, especially shifty eyes
   c. Customers who try to avoid being noticed
   d. Customers who wear loose bulky coats or dresses
   e. Customers who try to carry numerous articles of clothing into fitting or dressing rooms.
5. Follow store policy concerning the number of articles of merchandise that a customer can take into fitting or dressing room at one time, if applicable.
6. Report observed shoplifting immediately to store manager or store security.
7. Do not make an effort to apprehend the shoplifter.
8. Explain to the store manager or store security exactly what was observed.
9. Let store manager or store security handle the situation.

PILFERAGE:
1. Observe person with unusual or suspicious behavior.
2. Mentally note the description of person and merchandise.
3. Notify manager or store security.
4. Give information to manager or store security.

References/Resources:

VTECS	Hardward Salesperson 26/40	Detect and report a shoplifter
	Fashion Salesperson 26/40	Detect and report shoplifting
IDECC	699/022	Recognize and handle shoplifters
	651/022	Know how to recognize and handle shoplifters

DUTY AREA:
PERFORMING CASHIERING ACTIVITIES

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Bank Card Sales Transactions

PERFORMANCE OBJECTIVE: Provided a customer who desires to make a bank card sales transaction, a merchandise bank card sales ticket and an imprinter, process the transaction. All required information must be entered on the bank card sales ticket, the ticket must be signed by the customer, and all procedures to validate the sales transaction must be performed.

PERFORMANCE GUIDE:

1. Ask the customer for bank card.
2. Check the credit card.
   a. If card is unsigned and the customer has positive identification, ask her/him to sign it.
   b. Compare the bank card against the card numbers on the most recent warning notice. If customer's number appears on the list, call the authorization center.
   c. Call the authorization center to verify customer's credit, or use computer equipment to get credit code.
3. Check the expiration date. If valid, continue processing. If card has expired, inform customer that purchase cannot be charged on the card.
4. Process the sales ticket through the imprinter with customer's card:
   a. Place credit card face-up in imprinter.
   b. Position sales draft face-up in imprinter.
   c. Imprint ticket. Check sales ticket to see that the following information is clearly printed:
      -Card holder's name
      -Expiration date
      -Account information
      -Merchant's name
5. Write the following information in the appropriate spaces:
   a. Date of sales transaction
   b. A description of merchandise
   c. Dollar amount of sale
   d. Dollar amount of the tax
   e. Total dollar amount of sale
   f. Credit card number
6. Ask the customer to sign the sales ticket. Check the signature to determine that it matches that signature on the card.
7. Call for authorization, if sales exceeds floor limit.

PERFORMANCE GUIDE (Cont.):

8. Check all copies of sales ticket to determine that each is legible.
9. Return the customer's bank card with copy of the sales ticket.
10. Keep both the "Merchant" and "Bank Copy."
11. Thank the customer for making the purchase.

References/Resources:

VTECS	Fashion Salesperson 31/45	Process bank card sales transactions
IDECC	889/S16	Handle charge sales transactions
	814/S16	Know how to handle a charge sales transaction
	815/S16	Know how to handle store and bank charge cards
	824/S15	Know the store's credit policies, terms, and plans
	831/S17	Know how to handle installment sales lay-away sales and COD sales
	125/C29	Write sales check
	898/S13	Write sales check
	819/S13	Know how to write a sales check
	374/Math 10	Calculate amount of customer's purchase
	363/Math 12	Compute discounts
	362/Math 18	Compute sales tax
	360/Math 18	Read and interpret self-computing charts

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Charge Sales Transactions

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make a charge sales transaction, a credit card, a credit sales ticket, and a credit card imprinter, process the transaction. When the charge sales transaction is completed, all applicable information must be written on the credit sales ticket, the ticket must be signed by the customer and all mathematical computations must be correct.

PERFORMANCE GUIDE:

Charge Sales With a Charge Card:

1. Check the credit card for validity:
    a. Check to determine that the card has been signed by the customer
    b. Check the expiration date to determine that card is valid
    c. Check the card against the store's bulletin
2. Check the amount of the sale to determine that it does not exceed the floor sales limit.
3. Call for authorization if required by store policy.
4. Complete charge sales ticket as follows:
    a. Date the ticket
    b. Write salesperson number
    c. Write department number
    d. Enter the number of each item purchased
    e. Write a description of item purchased
    f. Enter the cost of each item
    g. Multiply and enter the cost of each item by the number purchased
    h. Add and enter costs of all purchased items
    i. Determine and enter the amount of sales
    j. Add the subtotal of merchandise to the amount of sales tax, and enter on ticket
    k. Place charge sales ticket and customer's charge card on imprinter and imprint
5. Tell customer and total cost of the transaction.
6. Ask the customer to sign the charge sales ticket.
7. Return to customer the charge card.
8. Ring on cash register if required.
9. Give the customer a copy of the charge sales ticket.
10. Put the store's copy of charge sales ticket in designated place.
11. Package the customer's merchandise.
12. Thank the customer for making the purchase of merchandise.

PERFORMANCE GUIDE (Cont.)

Charge Sales Without a Charge Card:
1. Date the charge form.
2. Write the customer's name and address.
3. Write an itemized list of merchandise purchased.
4. Calculate a sub-total of taxable merchandise.
5. Calculate applicable tax.
6. Add tax and sub-total of taxable merchandise.
7. Calculate total of non-taxable items, if applicable.
8. Add taxable and non-taxable items, if applicable.
9. Enter total of purchase.
10. Obtain customer's signature, if applicable.
11. Give customer copy.
12. Retain store copy and distribute according to store policy.

References/Resources:

VTECS	Fashion Salesperson 33/48	Process charge sales transactions
	Hardware Salesperson 16/29	Process a credit sale
IDECC	889/S16	Handle charge sales transactions
	814/S16	Know how to handle a charge sales transaction
	815/S16	Know how to handle store and bank charge cards
	824/S15	Know the store's credit policies, terms, and plans
	831/S17	Know how to handle installment sales, lay-away sales and COD sales
	125/C29	Write sales check
	898/S13	Write sales check
	819/S13	Know how to write a sales check
	374/Math 10	Calculate amount of customer's purchase
	363/Math 12	Compute discounts
	362/Math 18	Compute sales tax
	360/Math 18	Read and interpret self-computing charts
VTECS	Cashier Checker 15/45	Write customer's charges

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Cash Sales Transactions

PERFORMANCE OBJECTIVE: Provided a cash sales ticket or cash register ticket, a customer with merchandise and money, process the cash sales transaction. All required information must be entered on the sales ticket, and all mathematical computations must be correct.

PERFORMANCE GUIDE:

1. To complete a cash sales ticket:
   a. Fill out the
      -Quantity of merchandise
      -Description of merchandise
   b. Total the cost of merchandise
   c. Enter the applicable amount of sales tax
   d. Add the cost of merchandise to the amount of sales tax
   e. Enter the total cost of the transaction
   f. Tell the customer the amount due
   g. Accept remittance (cash or check) and return any applicable change due the customer
      *Authorize customer check
2. To complete a sale on cash register:
   a. Place sales ticket in register
   b. Ring up the cost of each article of merchandise
   c. Sub-total the sale
   d. Enter applicable sales tax
   e. Total the sales transaction
   f. Tell the customer the amount due
   g. Accept customer's remittance (cash or check) and return any applicable change
   h. Authorize customer check, if applicable
3. Package the customer's purchase.
4. Give the customer a copy of the receipt of the sales transaction
5. Keep a store copy.
6. Express thanks to the customer for shopping at the store.

References/Resources:

VTECS	Fashion Salesperson 32/47	Process cash sales transaction
	Hardware Salesperson 13/26	Process a cash sale
IDECC	890/S14	Handle cash sales transactions
	813/S14	Know how to handle cash sales transactions
	832/S14	Know how to process checks received in payment
	621/016	Know how to authorize customer checks
	125/C29	Write sales check
	898/S13	Write sales check
	819/S13	Know how to write sales check
	374/Math 10	Calculate amount of customer's purchase
	363/Math 12	Compute discounts
	362/Math 18	Compute sales tax
	360/Math 18	Read and interpret self-computing charts
	888/S11	Operate the cash register
	371/Math 13	Operate the cash register
	816/S11	Know how to operate the cash register
	384/Math 5	Calculate the single price of a multiple priced item
	371/Math 13	Make change
	386/Math 13	Make change
	896/S10	Make change
	818/S10	Know how to make change
	354/Math 15	Know how to correct cash register error

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Accept Valid Consumer Redeemable Coupons (Vendor and Store)

PERFORMANCE OBJECTIVE: Given specimen vendor and store coupons and an order of merchandise, check the coupons with the order and accept only those which are valid.

PERFORMANCE GUIDE:

1. Examine coupons for valid dates.
2. Inspect merchandise to determine that customer has purchased the correct item of merchandise.
3. If applicable, check to see that customer has purchased required amount of merchandise.

References/Resources:

VTECS Cashier Checker 4/11 Accept valid consumer coupons (vendor and store)

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Determine Amount Of Sales Tax

PERFORMANCE OBJECTIVE: Provided an order of merchandise containing both taxable and nontaxable items, a list of taxable merchandise, and a tax chart, ring up the order. A correct total must be registered.

PERFORMANCE GUIDE:

1. Register each taxable and nontaxable item on the correct amount, department and taxable item keys.
2. Depress the taxable total key.
3. Determine the correct amount of tax to register by reading indicators or tax chart.
4. Depress the correct amount and tax key.
5. Depress the total key.

References/Resources:

VTECS Cashier Checker 8/21 Determine amount of sales tax

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Authorize Customers' Checks

PERFORMANCE OBJECTIVE: Given three examples of customer checks, authorize the checks that are valid.

PERFORMANCE GUIDE:

1. Examine the check for acceptability.
   a. Identify the bank on which the check is drawn.
   b. Determine that the date is acceptable.
   c. Verify that the payee line is correctly filled in.
   d. Verify that the written amount and figure amount are in agreement.
   e. Ask customer for identification and write identifying numbers on back of check.
      -Driver's license
      -Credit cards
      -Social security number
   f. Verify that check is correctly signed by customer and matches the signature on driver's license.
   g. Determine that check has no alterations.
2. Authorize the check according to store policy.
   a. Initial the check.
   b. Determine whether further authorization is needed.

References/Resources:

VTECS	Fashion Salesperson 24/38	Authorize customers' checks
	Hardware Salesperson 14/27	Process a cash sale paid by check
IDECC	832/S14	Know how to process checks received in payment
	621/016	Know how to authorize customer's check

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Make Change

PERFORMANCE OBJECTIVE: Given a total cost for an order of merchandise and the amount of money submitted by customer, make change to the customer. All items on the instructor's checklist must be performed acceptably.

PERFORMANCE GUIDE:

1. For Change-Calculating Cash Registers
    a. Orally state the total cost of the order of merchandise
    b. Orally state the amount that the customer remits
    c. Place the customer's money on the cash register change plate
    d. Orally count back to the customer the amount of change due, beginning with the largest denominations (bills) and closing with coins
    e. Place customer's money into cash drawer after they have acknowledged receiving the correct change
2. For Nonchange-Calculating Cash Registers:
    a. State orally the total amount of purchase
    b. State orally the amount of customer's remittance
    c. Place customer's remittance on cash register change plate
    d. Silently count starting at the total cost to customer and add up to the amount remitted, as you are obtaining cash from the cash drawer.
    e. Use the largest denomination of coins and bills available for change.
    f. Count aloud starting at the total cost to customer as you are returning change to customer.
    g. Count up to the total amount rendered by the customer.
    h. Place customer's remittance into cash drawer only after customer has acknowledged receiving correct amount.

INSTRUCTOR CHECKLIST: Make Change

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. For Change-Calculating Cash Register: a. Orally stated the total amount of purchase? b. Orally stated the amount of customer remittance? c. Placed customer's remittance on cash register			
change plate? d. Orally counted the change to customer? e. Returned change in largest denominations of bills and coins?			
f. Placed customer's remittance into cash drawer only after the customer had acknowledged receiving correct change?			
2. For Nonchange-Calculating Cash Register: a. Stated orally the total amount of purchase? b. Stated orally the amount of customer's remittance?			
c. Placed customer's remittance on cash register change plate? d. Silently counted starting at the total cost to customer and added up to the amount remitted, while obtaining cash from the cash drawer?			
e. Used the largest denomination of coins and bills available for change? f. Counted aloud starting at the total cost to customer while returning change to customer?			
g. Counted up to the total amount rendered by the customer? h. Placed customer's remittance into cash drawer only after customer had acknowledged receiving			
correct amount?			

References/Resources:

VTECS Cashier Checker 14/41 Make change

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Issue Trading Stamps

PERFORMANCE OBJECTIVE: Given an order of merchandise, ring up the order and issue trading stamps or all eligible items. All items on the instructor's checklist must be acceptably completed.

PERFORMANCE GUIDE:

1. Set aside ineligible items (cigarettes, acoholic beverages and/or other items according to state law).
2. Ring up and sub-total eligible items.
3. Issue on trading stamp per 10¢ in the largest denominations available.
4. Ring up ineligible items.
5. Ring up taxable total.
6. Determine amount of tax.
7. Ring tax.
8. Ring total.

INSTRUCTOR CHECKLIST: Issue Trading Stamps

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Set aside ineligible items? (cigarettes, acoholic beverages and/or other items according to state law)			
2. Rang up and sub-totaled eligible items?			
3. Issued one trading stamp per 10¢ in the largest denominations available?			
4. Rang up ineligible items?			
5. Rang up taxable total?			
6. Determined amount of tax?			
7. Rang tax?			
8. Rang total?			

References/Resources:

VTECS Cashier Checker 12/35 Issue trading stamps

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Package/Bag Customer's Orders Of Merchandise

PERFORMANCE OBJECTIVE: Provided merchandise, boxes, scissors, bags, wrapping paper, packing material, wrapping tape and wrapping area, package the merchandise. The package must be appropriate for the type of merchandise, must be secure and must have receipt attached.

PERFORMANCE GUIDE:

Packaging:

1. Inspect the merchandise to determine that it is in good condition before packaging it.
2. Select the best method for packaging the merchandise:
   a. Bagging
   b. Boxing
   c. Wrapping
3. Assemble the materials for packing the merchandise:
   a. Scissors
   b. Wrapping paper
   c. Bags
   d. Boxes
   e. Tissue paper
   f. Packing material
   g. Tape
4. Package merchandise:
   -slip a plastic dust cover over
   -wrap each item
5. Box items:
   a. Select appropriate size box
   b. Line the box with tissue paper
   c. Place merchandise in the box
   d. Fold the sides of the tissue paper over the merchandise
   e. Close box and secure with fastener or tape
6. Place merchandise in bag.
7. Attach sales receipt or tag showing customer has paid for merchandise.
8. Thank the customer for making the purchase.

PERFORMANCE GUIDE (Cont.):

Bagging:

1. Select proper bag size for the order of merchandise.
2. Open the bag carefully without tearing.
3. Place bag on bagging shelf or on the check-out counter
4. Place heavy items in bottom of bag.
5. Place rectangular items along the sides of the bag.
6. Place glass items in protected space in bag.
7. Place fragile and crushable items in the top of bag.
8. Place small items between merchandise of different shape.
9. Distribute heavy and light items evenly among bags.
10. Place moist items in insulated or polybags.
11. Place odor-producing merchandise in separate appropriate-sized bag, then into larger bags.
12. Check tops of hazardous items. Tighten if loose.
13. Place hazardous products in separate bags.
14. Check checkstand to see that all merchandise has been bagged.
15. Load cart, if applicable.
16. Give claim check to customer, if applicable.

References/Resources:

VTECS Fashion Salesperson 30/44 Package customers' purchase

Cashier Checker 33/97 Bag Customer's Order of Merchandise

IDECC 887/S18 Pack and/or wrap merchandise
552/PS37 Pack and/or wrap merchandise

629/Mdse 32 Know wrapping/packaging methods

DUTY AREA:
PERFORMING CUSTOMER SERVICE ACTIVITIES

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Installment Credit Sales

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make an installment credit sales transaction, an installment sales credit form and merchandise, process the sales transaction. All applicable information must be written on the credit form, and the customer must be aware of the amount of interest and principal that will have to be paid.

PERFORMANCE GUIDE:

Conclude the sales transaction:

1. Ask the customer for the following information and write it in the appropriate spaces on the installment credit sales form:
   a. Name and address
   b. Date of the sales transaction
   c. A description of the merchandise
   d. Price of the merchandise
   e. Department identification
   f. Salesperson identification
   g. Subtotal (cost) of merchandise
   h. Amount of applicable sales tax
   i. Total cost of the transaction
2. Add the cost of the finance charge to the total cost of the merchandise and write this total on the installment credit form.
3. Divide the total cost of the transaction by the number of payments.
4. Tell the customer the cost of finance charges and the annual percentage rate, following Truth and Lending Statues.
5. Ask customer if he/she has any questions concerning the transaction.
6. Ask the customer to sign the installment credit sales form.
7. Give the customer a copy of the installment credit sales agreement.
8. Route other copies of the installment sales agreement to the accounting department.

References/Resources:

VTECS Fashion Salesperson 36/52 Process installment credit sales

IDECC 831/S17 Know how to handle installment sales

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Lay-Away Sales

PERFORMANCE OBJECTIVE: Provided a customer who wishes to make a purchase on lay-away, merchandise and a lay-away sales ticket, process the sale. All required information must be legibly written on the lay-away sales ticket, and all mathematical computations must be correct.

PERFORMANCE GUIDE:

1. Legibly write the lay-away sales ticket. Include the following information:
    a. Customer's name, address and phone number
    b. Salesperson's identification number
    c. Department number
    d. A description of the merchandise
    e. Price of the merchandise
    f. Sub-total cost of the merchandise
    g. Sales tax, if applicable
    h. Sub-total of sales tax plus the cost of the merchandise plus lay-away fee
    i. Deposit made by customer
    j. Difference between total cost of merchandise and deposit
    k. Date the merchandise will be paid - out of lay away
2. Have customer sign the lay-away sales ticket.
3. Collect the deposit payment from the customer.
4. Give the customer a copy of the lay-away sales ticket.
5. Attach a copy to the merchandise.
6. Route a copy to the accounting department.
7. Send merchandise to lay-away storage.

References/Resources:

VTECS	Fashion Salesperson 37/53	Process lay-away sales
	Hardware Salesperson 17/30	Process a lay-away sale
IDECC	834/S17	Know the store's policy concerning lay-away
	831/S17	Know how to handle lay-away sales
	363/Math 12	Compute lay-away charge

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Write Customers' Telephoned Orders

PERFORMANCE OBJECTIVE: Given a customer making an order by telephone and an order pad, answer the call and write the order. The order must include customer's name and account number and merchandise requested, (delivery instructions as verified by the caller if requested).

PERFORMANCE GUIDE:

1. Answer the telephone.
2. Speak clearly using a friendly tone of voice identifying shop and self by name.
3. Quote prices of merchandise when asked by customer.
4. Write names and all information legibly and without spelling errors.
5. Write delivery instructions.
6. Write enclosure card message.
7. Verify customers' charge account.
8. Write the name and address of the recipient.
9. Read the finished order to the caller.
10. Close the telephone call.

References/Resources:

VTECS	Retail Flowershop Salesperson 30/118	Write customer's telephoned order
IDECC	835/S21	Handle telephone and mail orders
	115/Com 2	Handle telephone and mail orders
	556/PS25	Quote delivery dates and charges
	503/PS25	Know delivery area served by store, delivery charges, and delivery schedules
	624/Mdse 31	Know types of delivery systems

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Fill Mail And Telephone Orders

PERFORMANCE OBJECTIVE: Given a mailed or telephoned order for merchandise, fill the order. When finished, the order form should be correctly totaled, the merchandise packaged and placed in the customer pick-up or delivery area.

PERFORMANCE GUIDE:

1. Read the order form to obtain information concerning requested merchandise:
   a. Kind
   b. Color
   c. Size
   d. Style
   e. Price
   f. Quantity requested
2. Determine mode of payment.
3. Assemble the merchandise.
4. Write sales ticket.
5. Package the merchandise:
   a. Gift wrap if requested
   b. Bag or box the merchandise
6. Tape a copy of the order and sales ticket on the package.
7. Place the package in customer pick-up or delivery area.

References/Resources:

VTECS	Fashion Salesperson 27/41	Fill mail and telephone orders
IDECC	835/S21	Handle telephone and mail orders
	115/Com 24	Handle telephone and mail orders
	114/Com9	Know how to handle telephone and mail orders
	008/A7	Know how to handle telephone and mail orders

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Write Delivery Order

PERFORMANCE OBJECTIVE: Given a request for merchandise to be delivered, delivery form and special instructions, write a delivery order. All pertinent information must be listed according to store policy.

PERFORMANCE GUIDE:

1. Secure a delivery form.
2. List customer name, address and phone number.
3. Give delivery destination.
4. List items to be delivered.
5. Given time of delivery, date and special instructions.
6. Give customer copy of delivery order.
7. Label items to be delivered.

*Note: There may be a delivery charge.

References/Resources:

VTECS	Hardware Salesperson 20/33	Write a delivery order
IDECC	556/PS25	Quote delivery date and charge
	503/PS25 833/S20	Know delivery area served by store, delivery charges and delivery schedule
	624/Mdse 31	Know types of delivery systems

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING 1

TASK: Gift Wrap Customer's Purchase

PERFORMANCE OBJECTIVE: Given merchandise and access to gift wrapping tools and materials, gift wrap the merchandise. The finished package must compare with the instructor's model.

PERFORMANCE GUIDE:

1. Assemble tools and supplies at the work area:
   -Scissors (paper and ribbon)
   -Cellophane tape
   -Ribbon
   -Gift wrap paper
   -Tie-ons
2. Remove all price tags from the merchandise.
3. Place tissue liner in box.
4. Place merchandise and sender's card in gift box.
5. Cut a piece of wrapping paper so that it will be approximately twice the length of the largest dimension of the box and extends over both ends of the box slightly more than half the box.
6. Turn the box upside down and center it over the wrapping paper.
7. Pull the sides of the paper over the box. Turn 1/4" overlap and tape.
8. Fold the ends of the bottom to form a neat closure.
9. Tape the bottom flap of the wrapping.
10. Tie ribbon around box.
11. Tie bow; fasten bow and other novelty accessories to box.

*Note: Sender's card may be attached on outside of gift box.

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Customer's Exchange

PERFORMANCE OBJECTIVE: Provided a customer with merchandise to exchange, process the customer's request. The exchange must be made according to store policy; money, credit or additional paid by customer must be accounted for; reason for exchange must be noted on exchange form.

PERFORMANCE GUIDE:

1. Check the customer's sales slip to determine type of sale.
2. Process exchanges according to store policy. For example:
   a. Exchange the merchandise for another item if sales receipt is lost
   b. Give cash refunds only if customer has a sales receipt and if the exchange is requested within store's specified time period
   c. Give merchandise exchange only on sale merchandise
   d. Give merchandise exchange only; no cash refunds
3. Maintain a good relationship with the customer throughout the process of exchanging merchandise to keep the customer satisfied.
4. Complete store merchandise exchange forms according to store policy. Obtain the following:
   a. Customer's name, address, telephone number
   b. Description of item being exchanged, its price and condition
   c. Reason for exchange
   d. Customer's signature
   e. Co-signature if required

References/Resources:

VTECS	Fashion Salesperson 34/50	Process customer's exchanges
IDECC	879/S19	Handle merchandise returns
	817/S19	Know how to handle merchandise returns
	547/PS40	Analyze returned merchandise

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
X Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Process Customer's Refund

PERFORMANCE OBJECTIVE: Provided a customer who desires a cash refund, merchandise, customer sales receipt, and a cash refund book, process the refund. When finished, all applicable information must be written on the refund form, and all applicable monies must be returned to customer.

PERFORMANCE GUIDE:

1. Determine whether refund can be made (based on store policy).
2. Write cash refund ticket including the following information:
   a. Customer's name
   b. Customer's complete address
   c. Name of department from which the merchandise was purchased
   d. Date merchandise was purchased
   e. Salesperson who sold item of merchandise
   f. Description of merchandise
   g. Quantity of merchandise purchased to be refunded
   h. Price of merchandise
   i. Subtotal cost of merchandise purchased
   j. Amount of tax paid by customer
   k. Total cost of purchase to be refunded
   l. Initials of salesperson making refund
   m. Current date
3. Ask customer to sign refund slip.
4. If applicable, obtain authorization from proper store employee.
5. Give customer cash refund.
6. Place store copy of cash refund slip in cash drawer of cash register.

*Note: Credit slip/credit due may be used.

References/Resources:

VTECS	Fashion Salesperson 38/54	Process refunds
	Hardware Salesperson 11/24	Make refund for returned merchandise
IDECC	879/S19	Handle merchandise returns
	817/S19	Know how to handle merchandise returns
	547/PS40	Analyze returned merchandise

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Adjust Or Refer Customer Complaints

PERFORMANCE OBJECTIVE: Given examples of customer complaints, adjust each complaint. Each activity on the instructor's checklist must be performed acceptably.

PERFORMANCE GUIDE:

1. Courteously listen attentively to everything the customer has to say before replying.
2. Agree with the customer that she/he has a right to complain.
3. Make appropriate adjustment according to store policy.
4. Refer the customer to the person in the store who is authorized to adjust complaints.
5. Maintain composure and avoid arguing with customers.

INSTRUCTOR CHECKLIST: Adjust And/Or Refer Customer Complaints

ACTIVITY	RATING*	
	Acceptable	Unacceptable
1. Courteously listened to everything the customer had to say before replying?		
2. Agreed with the customer that she/he had a right to complain?		
3. Made appropriate adjustment according to store policy?		
4. Referred the customer to the person in the store who is authorized to adjust complaints?		
5. Maintained composure and avoided arguing with customer?		

References/Resources:

VTECS	Cashier Checker 29/89	Refer customer complaints to proper store authority
	Cashier Checker 32/35	Adjust customer's complaints
IDECC	115/Com 20	Handle customer inquiries and complaints
	823/S60	Handle customer inquiries and complaints
	280/HR28	Know how to handle customer complaints
	261/H47	Know the importance of human relations
	871/S58	Suggest substitute merchandise
	507/PS28	Know the location of merchandise on the selling floor or in storage
	505/PS19	Know merchandise size, color, style and price available
	117/Com 20	Interpret store policies for customers

___ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Answer Customer Inquiries Concerning Directions; Concerning Customer Facilities; Concerning Store Policies

PERFORMANCE OBJECTIVE: Given case studies of customer inquiries, answer all of the inquiries according to store policy. All applicable items on the instructor's checklist should be performed acceptably.

PERFORMANCE GUIDE:

1. Listen courteously to customer's inquiry.
2. Answer courteously. Do not ignore inquiry.
3. Give specific directions to merchandise and/or customer facilities or take customer.
4. Give explanation of store policy.
5. Refer customer to appropriate personnel if unable to help.

INSTRUCTOR CHECKLIST: Answer Customer Inquiries Concerning Directions; Concerning Customer Facilities; Concerning Store Policies

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Listened courteously to customer's inquiry?			
2. Answered courteously and did not ignore inquiry?			
3. Gave specific directions to merchandise or took customer?			
4. Gave explanation of store policy?			
5. Referred customer to appropriate personnel if unable to help?			

References/Resources:

VTECS	Cashier Checker 31/93	Answer customer inquiries concerning directions and products
IDECC	116/Com 20 823/S60	Handle Customer Inquiries and Complaints (merchandise and/or store services)
	261/HR47	Know the importance of human relations
	623/Mgt. 25	Know the location and availability of customer facilities
	042/Adv 7	Inform customer of advertised merchandise
	003/Adv 7	Know prices available sizes, colors, styles, or models of advertising merchandise
	014/Adv 2	Know available supply of merchandise advertised
	194/022	Answer customer request for displayed merchandise
	871/S58	Suggest substitute merchandise
	507/PS28	Know substitute items
	505/PS28	Know location of merchandise on selling floor or in storage
	506/PS36	Know merchandise size, color, style and price available
	117/Com 20	Interpret store policies for customers
	194/022	Answer customer request for displayed merchandise
	048/Adv 7	Inform customers of special in-store events/promotions

DUTY AREA:
PERFORMING SELLING ACTIVITIES

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Make A Sales Presentation

PERFORMANCE OBJECTIVE: Provided merchandise and a customer, make a sales presentation. All applicable items on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Open the sales presentation.
2. Demonstrate the merchandise.
3. Translate selling features into customer benefits.
4. Compare competing products to one's own product.
5. Assist customers interpret stamps, tags, etc.
6. Explain merchandise guarantees and directions to customers.
7. Explain grades to customers, if applicable.
8. Translate technical words, if applicable.
9. Handle customer objections.
10. Handle difficult customers.
11. Suggest substitute merchandise.
12. Suggest advertised merchandise.
13. Close the sale.
14. Suggest accessory items.

INSTRUCTOR CHECKLIST (Cont.)

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
12. Suggested advertised merchandise?			
13. Closed the sale?			
14. Suggested accessory items?			

References/Resources:

IDECC 869/S31	Open sales presentation
812/S30	Know how to open sales presentation
511/PS32	Know how to use merchandise information (merchandise approach) in opening a sale
830/S40	Know how to analyze customer needs
506/PS36	Know merchandise size, color, style, price, etc. available
505/PS19	Know the location of merchandise on the selling floor or in storage
893/S46	Demonstrate merchandise
806/S46	Know how to demonstrate merchandise
550/PS32	Translate selling features into customer benefits
827/S34	Know the selling features of merchandise and services
501/PS35	Know how to show that merchandise is suitable for customer needs and purposes
499/PS34	Know how to interpret product features in terms of customer benefits
551/PS32	Prepare a sales talk using selling features
132/Comm11	Write descriptive sales phrases and sentences
548/PS35	Use merchandise information in selling
514/PS33	Know product features and customer acceptance of competing products
822/S34	Know how to use product information
513/PS29	Know current trends, product innovations, etc.
517/PS 20	Know how to acquire product information from hangtags, labels, and directions
502/PS20	Know the sources of product information
435/Mdse 58	Read trade journals and buying office aids
022/Adv 3	Know how to use manufacturers' brochures and pamphlets

References/Resources (Cont.)

IDECC 039/Adv 7	Analyze advertisement for selling information
555/PS21	Know how to use information from advertisements in selling
561/PS38	Use brand/trade names
518/PS38	Know the use of brand/trade names
519/PS38	Know the use of brand/trade names
012/Adv 2	Know effects of brand names
553/PS33	Compare competing products to one's own product
563/PS33	Use product comparison in selling
508/PS35	Know uses of merchandise and differences between similar items
546/PS22	Make comparison shopping trips
559/PS20	Assist customers interpret stamps, tags, etc.
554/PS28	Explain merchandise guarantees and directions to customers
512/PS28	Know the purpose of merchandise guarantees and directions
558/PS30	Explain grades to customers
515/PS31	Know protective features of standards, grades, and labels
516/PS30	Know merchandise grade markings
521/PS31	Know laws regarding standards and grades
522/PS31	Know the provisions in the Pure Food, Drug and Cosmetic Act
523/PS31	Know the Federal Trade Commission protective measures
524/PS31	Know the consumer protection agencies
143/Comm12	Translate technical words for customers
874/S49	Handle customer objections
897/S43	Handle difficult customers
810/S43	Know how to handle difficult customers
871/S58	Suggest substitute merchandise

References/Resources (Cont.)

IDECC	507/PS28	Know substitute items
	826/S28	Know locations of department and merchandise within store
	882/875/S57	Suggest accessory items
	809/S59	Know how to suggest accessory items
	826/S28	Know locations of department and merchandise within store
	877/S28	Suggest advertised merchandise
	014/Adv 2	Know supply of advertised merchandise
	895/876/S52	Close the sale
	820/S52	Know how to close the sale
	811/S50	Know how to help the customer make the buying decision
	559/PS20	Use tags, stamps, wrappers, etc.

___ Receiving Clerk 222.387-050
___ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Demonstrate Merchandise

PERFORMANCE OBJECTIVE: Provided an article of merchandise and a customer who is interested in having the item demonstrated, demonstrate the merchandise. The demonstration must include interesting and informative remarks regarding the merchandise and a showing of styles and colors. An effort must be made to involve the customer in the sale and to answer all of the customer's questions honestly.

PERFORMANCE GUIDE:

1. Open the sales demonstration by giving the customer some interesting and informative remarks about the item of merchandise.
2. Try to determine customer needs.
3. Show the customer an assortment of styles, colors, and patterns.
4. Show the customer the outstanding features of the merchandise.
5. Make an effort to involve the customer in the demonstration.
6. Answer customer's questions and objections honestly and forthrightly.
7. Appeal to the customer's senses during the demonstration:
    a. Feel
    b. Smell
    c. Taste
    d. Sight
8. Sell product benefits while demonstrating item of merchandise.

References/Resources:

VTECS Fashion Salesperson 25/39	Demonstrate merchandise
IDECC 893/S46	Demonstrate merchandise
806/S46	Know how to demonstrate merchandise

DUTY AREA:
PERFORMING EMPLOYEE TRAINING ACTIVITIES

_X_ Receiving Clerk 222.387-050
_X_ Stock Clerk 299.367-014
222.387-058
_X_ Salesperson/Sales Clerk
Retail Trade 290.477-014

RETAILING I

TASK: Assist With Training/Sponsoring New Employee

PERFORMANCE OBJECTIVE: Provided a new employee to be trained, assist with the training/sponsor the new employee. All applicable criteria on the instructor's checklist must be completed.

PERFORMANCE GUIDE:

1. Prepare the employee for training:
   a. Put trainee at ease.
   b. State specific job.
   c. Find out what trainee knows about the job.
   d. Develop interest and desire to learn.
   e. Place trainee in correct learning attitude.
2. Present the job:
   a. Tell and show and illustrate and question.
   b. One step at a time.
   c. Stress key points.
   d. Not more than trainee can master.
3. Try out performance:
   a. Have trainee do job and correct errors, if any.
   b. Have trainee do job again and explain.
   c. Have trainee explain KEY points.
   d. Question trainee--what, why, how.
   e. Continue until trainee knows what YOU know.
4. Follow-up;
   a. Put the trainee on their own.
   b. Tell trainee where to go for help.
   c. Check frequently and encourage questions.
   d. Taper off coaching.

INSTRUCTOR CHECKLIST: Assist With Training/Sponsoring New Employees

ACTIVITY	RATING*		
	Acceptable	Unacceptable	N/A
1. Prepared the employee for training: a. put trainee at ease? b. stated specific job? c. found out what trainee already knew about the job?			
d. presented a positive attitude for learning?			
2. Presented the job?			
3. Tried out performance?			
4. Followed-up?			

References/Resources:

IDECC	282/HR58	Sponsor new employee
	138/Com39	Assist with training of other

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS

RECEIVING CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		CUSTOMER SERVICE
464	Mdse 19	Handle special orders of merchandise
404	Mdse 19	a. Know how to handle special orders of merchandise
835	S 21	Handle telephone and mail orders
115	Com 24	Handle telephone and mail orders
008	A 7	a. Know how to handle telephone and mail orders
114	Com 9	a. Know how to handle telephone and mail orders
359	Math 7	b. Compute postal and mail charges
116	Com 20	Handle customer inquiries
623	Mgt 25	a. Know the location and availability of customer facilities
		STORE OPERATIONS
		Carry-out expense controls
348	Math 21	a. Know operating expenses
666	O 15	b. Know how to use expense controls
619	O 15	c. Know supply expense controls
725	O 15	d. Keep informed of new developments that might aid in reducing expenses
		INVENTORY
463	Mdse 26	Take physical inventory
442	28	a. Take stock count for inventory
414	27	b. Know how to take a stock count for physical inventory
466	Mdse 4	Prepare inventory control records and forms
400	Mdse 3	a. Know how to prepare inventory control records and forms
		PRICING
		Price mark merchandise
710	O 9	Operate price-marking equipment
644	O 9	a. Know how to operate price-marking equipment
709	O 9	Put price tickets on merchandise
645	O 9	a. Know how to put price tickets on merchandise
444	Mdse 40	Change prices on merchandise
406	Mdse 40	a. Know methods and procedures for changing prices
426	Mdse 40	b. Know procedures for recording price changes
641	O 5	Know price marking bookkeeping procedures
396	Mdse 38	Know store's pricing policies and price-line structure

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS

RECEIVING CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
647	0 5	Know price marking terminology
		RECEIVING PROCEDURES
		Unload delivery truck
669	0 4	a. Know how to unload a delivery truck
		Process incoming merchandise
708	0 5	a. Check-in merchandise against the invoice
638	0 5	b. Know procedures for checking-in merchandise against the invoice
		Record incoming merchandise
641	0 5	a. Know receiving bookkeeping procedures
703	0 6	Determine shipping and receiving discrepancies
413	Mdse 25	Know reasons for returning merchandise to management
707	0 7	Handle incorrect amounts or types of merchandise
639	0 7	a. Know procedures for handling incorrect amounts or types of merchandise
		File claims for merchandise damages, overages, and shortages on carriers or management
642	0 6	a. Know the procedures for filing claims for merchandise overages and shortages on carriers or manufacturers
		Report damaged merchandise
634	0 11	a. Know procedures for reporting and handling damaged merchandise
700	0 7	Wrap or package merchandise for return to vendor
706	0 6	Follow-up on non-delivered or lost merchandise
643	0 6	a. Know how to follow-up non-delivered or lost merchandise
646	0 3	b. Know vendor to store transportation modes
		Use receiving terminology
647	0 5	a. Know receiving terminology
		Use shipping terminology
378	Math 28	a. Know shipping terminology
702	0 4	Route merchandise to selling department or warehouse
366	Math 28	Calculate transportation charges
		STOCKING
		Use stockkeeping forms and reports
640	0 10	a. Know how to use stockkeeping forms and reports

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS

RECEIVING CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		STORAGE
648	0 10	Arrange merchandise in stockroom
		EMPLOYEE MANAGEMENT
282	HR 58	Sponsor new employees
138	Com 39	Assist with training of other employees
		STORE SECURITY
699	0 22	Recognize and handle shoplifters
651	0 22	a. Know how to recognize and handle shoplifters
		STORE SAFETY
		Handle employee and customer accidents
660	0 2	a. Know how to handle employee and customer accidents
		Carry-out safety procedures for handling equipment
732	0 2	a. Know safety procedures for handling equipment
		Use stocking safety procedures
615	0 2	a. Know stocking safety procedures
696	0 1	Handle and care for store equipment

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
STOCK CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		ADVERTISING
014	Adv 2	Count stock to be advertised
		DISPLAY
224	D 26	Construct display fixtures and backgrounds
215	D 26	Construct display fixtures and backgrounds
226	D 27	Construct display fixtures and backgrounds
183	D 13	a. Know how to construct display fixtures
182	D 14	b. Know how to consturct display backgrounds
221	D 26	Use manufacturer's display aids
188	D 13	a. Know how to use manufacturer's display aids
217	D 26	Dress mannequin
193	D 13	a. Know how to dress a mannequin
218	D 28	Adjust display lighting
185	D 16	a. Know how to use display lighting techniques
216/189	D 32/D 7	Build a mass display
209	D 32	Build displays of merchandise as it can be used
206	D 32	Build window display
205	D 32	Build counter display
203	D 32	a. Know display building techniques
201	D 32	b. Know how to use cartons, cases and boxes in building displays
190	D 7	c. Know types or arrangements or displays
207	D 33	Rearrange or replace display items sold from displays
177	D 8	Clean and straighten displays
211	D 8	Dismantle displays
192	D 8	Store display materials
		CUSTOMER SERVICE
116	Comm 20	Handle customer inquiries and complaints
823	S 60	Handle customer inquiries and complaints
280	HR 28	a. Know how to handle customer complaints
261	HR 47	b. Know the importance of human relations
042	Adv 7	c. Inform customers of advertised merchandise
003	Adv 7	d. Know available sizes, colors, styles, or models of advertised merchandise
014	Adv 2	e. Know available supply of merchandise advertised
194	D 22	f. Answer customer request for displayed merchandise
871	S 58	g. Suggest substitute merchandise
507	PS 28	h. Know substitute items
505	PS 19	i. Know the location of merchandise on the sales floor or in storage

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS

STOCK CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
506	PS 36	j. Know merchandise size, color, style and price available
464	Mdse 19	Handle special orders of merchandise
404	Mdse 19	a. Know how to handle special orders of merchandise
835	S 21	Handle telephone and mail orders
115	Comm 24	Handle telephone and mail orders
114	Comm 9	a. Know how to handle telephone and mail orders
008	Adv 7	b. Know how to handle telephone and mail orders
359	Math 7	c. Compute postal and mail charges
857	S 18	Pack and/or wrap merchandise
552	PS 37	Pack and/or wrap merchandise
629	Mdse 32	a. Know wrapping and packaging methods
556	PS 25	Quote delivery dates and charges
503	PS 25	a. Know delivery area served by store, delivery charges, and delivery schedule
624	Mdse 31	b. Know types of delivery systems
		STOCKING
504	PS 19	Stock Merchandise
838	S 24	a. Know how to stock merchandise
516	O 2	b. Know stocking safety procedures
840	S 23	c. Know the housekeeping duties performed for stock care
908	S 25	Rotate stock
698	O 8	Transfer stock
445	Mdse 3	Record transfer of stock
403	Mdse 30	a. Know the procedures for recording the transfer of stock
640	O 10	Use stockkeeping forms and reports
878	S 26	Locate and refill low stock items
881	S 27	Locate and arrange reserve stock
		STORAGE
		Arrange merchandise in stockroom
648	O 10	a. Know types of merchandise storage
615	O 2	b. Know storage safety procedures
		ORDERING
442	Mdse 28	Count stock for ordering

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
STOCK CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		INVENTORY
463	Mdse 26	Take physical inventory
442	Mdse 28	a. Count stock for inventory
414	Mdse 27	b. Know how to take a stock count for physical inventory
401	Mdse 27	c. Know the purpose of stock counts
400	Mdse 3	d. Know how to prepare inventory control forms and records
837	S 25	Prepare stock for inventory
		RECEIVING
708	0 5	Check-in merchandise against the invoice
638	0 5	a. Know procedures for checking-in merchandise against the invoice
		Inspect merchandise for damages
413	Mdse 25	a. Know reasons for returning merchandise to manufacturer
		Report damaged merchandise
634	0 11	a. Know procedures for reporting and handling damaged merchandise
707	0 7	Handle incorrect amounts or types of merhcandise
639	0 7	a. Know procedures for handling incorrect types or amounts of merchandise
700	0 7	Wrap or package merchandise for return to vendor
647	0 5	Use receiving terminology
		PRICING
710	0 9	Operate price-marking machine
644	0 9	a. Know how to operate price-marking machine
709	0 9	Put price tickets on merchandise
645	0 9	a. Know how to put price tickets on merchandise
444	Mdse 40	Change prices on merchandise
406	Mdse 40	a. Know the procedures/methods for changing prices
426	Mdse 40	b. Know procedures for recording price changes
647	0 5	Use price-marking terminology
396	Mdse 38	Know the store's pricing policies and price-line structure
		EMPLOYEE TRAINING
138	Comm 39	Assist with new employee training
282	HR 58	Sponsor new employee

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
STOCK CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		STORE SECURITY
699	0 22	Recognize and handle shoplifters
651	0 22	a. Know how to recognize and handle shoplifters
		STORE SAFETY
		Handle customer and employee accidents
660	0 2	a. Know how to handle customer and employee accidents
		Carry-out safety procedures for handling equipment
732	0 2	a. Know safety procedures for handling equipment
696	0 1	Handle and care for store equipment
		Carry-out stocking safety procedures
615	0 2	a. Know stocking safety procedures
		STORE OPERATIONS
		Carry-out expense controls
348	Math 21	a. Know operating expenses
666	0 15	b. Know how to use expense controls
619	0 15	c. Know supply expense controls

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS

SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		ADVERTISING
		Selection of merchandise for advertising
050	Adv 2	a. Make comparison shopping trips
004	Adv 2	b. Know how to make comparison shopping trips
		DISPLAY
		Sketch and design display sets
230	D 25	a. Use various types of display arrangements
190/178	D 7	b. Know different types of display arrangements
231	D 26	c. Use various types of display fixtures
174	D 13	d. Know types of display fixtures
228	D 24	e. Use principles of color, harmony, balance and proportion
179	D 10	f. Know how to use principles of color, balance, and proportion
		Display Fixtures
217	D 26	a. Dress mannequins
193	D 13	b. Know how to dress mannequins
221	D 26	c. Use manufacturer's display aids
188	D 13	d. Know how to use manufacturer's display aids
		Display signs
217	D 29	a. Develop display signs
195	D 29	b. Know how to develop display signs
227	D 31	c. Design and letter signs
181	D 17	d. Know how to design and letter signs
225	D 30	e. Use price cards
180	D 17	f. Know how to use price cards
		Build displays
209/894	D 32/S 29	a. Build displays of merchandise as it can be used
191/805	D 7/S 29	b. Know how to build displays of merchandise as it can be used
203	D 32	c. Know display building techniques
201	D 32	d. Know how to use cartons, boxes and cases in building displays
216	D 32	e. Build mass displays
189	D 7	f. Know principles of mass display
205	D 32	g. Arrange counter displays
206	D 32	h. Arrange window displays
176	D 15	Prepare merchandise for display
207	D 33	Rearrange or replace display items sold from display
177	D 8	Clean and straighten display
211	D 8	Dismantle display
192	D 8	Store display materials

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
		SELLING
869	S 31	Open sales presentation
812	S 30	a. Know how to open a sales presentation
511	PS 32	b. Know how to use merchandise information (merchandise approach) in opening a sale
830	S 40	c. Know how to analyze customer needs
506	PS 36	d. Know merchandise size, color, price, etc. available
505	PS 19	e. Know the location of merchandise on the selling floor on in storage
893	S 46	Demonstrate Merchandise
806	S 46	a. Know how to demonstrate merchandise
550	PS 32	Translate selling features into customer benefits
827	S 34	a. Know the selling features of merchandise and services
501	PS 35	b. Know how to show that merchandise is suitable for customer needs and purposes
499	PS 34	c. Know how to interpret product features in terms of customer benefits
551	PS 32	d. Prepare a sales talk using selling features
132	Comm 11	e. Write descriptive sales phrases and sentences
548	PS 35	f. Use merchandise information in selling
514	PS 33	g. Know product features and customer acceptance of competing products
822	S 34	h. Know how to use product information
513	PS 29	i. Know current trends, product innovations, etc.
517	PS 20	j. Know how to acquire product information from handtags, labels,and directions
559	PS 20	k. Use tags, stamps, wrappers, etc.
502	PS 20	l. Know the sources of product information
435	Mdse 58	m. Read trade journals and buying office aids
022	Adv 3	n. Know how to use manufacturer's brochures and pamphlets
039	Adv 3	o. Analyze advertisements for selling information
555	PS 21	p. Know how to use information from advertisements in selling
518/519	PS 38	q. Know brand and trade names
012	Adv 2	r. Know the effects of brand names
553	PS 33	s. Compare competing products to one's own product
563	PS 33	t. Use product comparison in selling
508	PS 35	u. Know uses of merchandise and differences between similar items
546	PS 22	v. Make comparison shopping trips

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS

SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
559	PS 20	Assist customers interpret stamps, tags, etc.
554	PS 28	Explain merchandise guarantees and directions to customers
512	PS 28	a. Know the purpose of merchandise guarantees and directions
558	PS 30	Explain grades to customers
515	PS 31	a. Know protective features of standards, grades and labels
516	PS 30	b. Know merchandise grade markings
·521	PS 31	c. Know laws regarding standards and grades
522	PS 31	d. Know the provisions of the Pure Food, Drug and Cosmetic Act
523	PS 31	e. Know the Federal Trade Commission protective measures
524	PS 31	f. Know the consumer protection agencies
143	Comm 12	Translate technical works for customers
874	S 49	Handle customer objections
897	S 43	Handle difficult customers
810	S 43	a. Know how to handle difficult customers
871	S 58	Suggest substitute merchandise
507	PS 28	a. Know substitute items
826	S 28	b. Know locations of departments and merchandise within the store
882/875	S 7	Suggust accessory items
809	S 59	a. Know how to suggest accessory items
826	S 28	b. Know locations of department and merchandise within the store
877	S 28	Suggest advertised merchandise
809	S 59	a. Know how to suggest advertised merchandise
826	S 28	b. Know locations of department and merchandise within the store
014	Adv 2	c. Know supply of advertised merchandise
876/895	S 52	Close the sale
820	S 52	a. Know how to close the sale
811	S 50	b. Know how to help the customer make the buying decision
889	S 16	Handle charge sales transactions
814	S 16	a. Know how to handle a charge sales transaction
815	S 16	b. Know how to handle store and bank charge cards
824	S 15	c. Know the store's credit policies, terms, and credit plans
831	S 17	d. Know how to handle installment sales, lay-away sales and COD sales
363	Math 12	e. Compute lay-away charges
898	S 13	f. Write a sales check
125	Comm 29	Write a sales check

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
819	S 13	g. Know how to write a sales check
374	Math 10	h. Calculate amount of customer's purchase
363	Math 12	i. Compute discounts
362	Math 18	j. Compute sales tax
360	Math 18	k. Read and interpret self-computing charts
890	S 14	Handle cash sales transactions
813	S 14	a. Know how to handle cash sales transactions
832	S 14	b. Know how to process checks received for payment
621	O 16	c. Know how to authorize customer checks
898	S 13	d. Write sales checks
125	Comm 29	e. Write sales checks
819	S 13	f. Know how to write sales checks
374	Math 10	g. Calculate amount of customer's purchase
363	Math 12	h. Compute discounts
362	Math 18	i. Compute sales tax
360	Math 18	j. Read and interpret self-computing charts
888	S 11	Operate the cash register
371	Math 13	Operate the cash register
815	S 11	a. Know how to operate the cash register
384	Math 5	b. Calculate the single price of a multiple priced item
896	S 10	c. Make change
371	Math 13	d. Make change
386	Math 13	e. Make change
818	S 10	f. Know how to make change
354	Math 15	g. Know how to correct cash register errors
		CUSTOMER SERVICE
134	Comm 23	Assist customer fill-out credit application forms
525	PS 1	a. Know the procedures for obtaining a credit card
601	O 21	b. Know how to interpret credit policies
118	Comm 21	Interpret billing statements
116	Comm 20	Handle customer inquiries and complaints
823	S 60	Handle customer inquiries and complaints
280	HR 28	a. Know how to handle customer complaints
117	Comm 20	Interpret store policies for customers
194	D 22	Answer customer request for displayed merchandise
879	S 19	Handle merchandise returns
817	S 19	a. Know how to handle merchandise returns
547	PS 40	b. Analyze returned merchandise
464	Mdse 19	Handle special orders of merchandise
404	Mdse 19	a. Know how to handle special orders of merchandise
835	S 21	Handle telephone and mail orders
115	Comm 24	Handle telephone and mail orders

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
114	Comm 9	a. Know how to handle telephone and mail orders
008	Adv 7	b. Know how to handle telephone and mail orders
359	Math 7	c. Compute postal and mail charges
887	S 18	Pack and/or wrap merchandise
552	PS 37	Pack and/or wrap merchandise
629	Mdse 32	a. Know wrapping/packaging methods
620	Mdse 29	b. Know gift wrapping services and charges
556	PS 25	Quote delivery dates and charges
503	PS 25	a. Know delivery area served by the store, delivery charges, and delivery schedules
833	S 20	b. Know delivery area served by the store, delivery charges, and delivery schedules
624	Mdse 31	c. Know types of delivery systems
363	Math 12	Compute alteration charges
825	S 54	a. Know how to handle sales requiring merchandise alterations
042	Adv 7	Inform customers of location and availability of advertised merchandise
003	Adv 7	a. Know the price, size, colors, styles, etc. of advertised merchandise
048	Adv 7	Inform customers of special in-store events/promotion
834	S 17	Explain store's policy concerning lay-away
831	S 17	a. Compute lay-away charges
363	Math 12	b. Compute lay-away charges
		STORE/DEPARTMENT OPERATIONS
361	Math 16	Balance the cash register
389	Math 17	Balance the cash register
636	O 14	Prepare daily sales summary sheets
632	O 14	Close out the department
680	O 19	Receive and record customer payment of bills
600	O 19	a. Know how to receive and record customer payment of bills
595	O 19	b. Know billing procedures
		INVENTORY
463	Mdse 26	Take physical inventory
442	Mdse 28	a. Take stock count for inventory
414	Mdse 27	b. Know how to take a stock count for physical inventory
401	Mdse 27	c. Know the purposes of stock counts
400	Mdse 3	d. Know the forms and records used in inventory control

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
837	S 25	Prepare stock for inventory
470	Mdse 5	Use ticket stubs and/or special forms to key records of merchandise sold
428	Mdse 5	a. Know how to use ticket stubs and/or forms for keeping records of merchandise sold
467	Mdse 31	Use unit inventory control information
427	Mdse 5	a. Know the uses of inventory control information
		EMPLOYEE TRAINING
138	Comm 39	Assist in training other employees
282	HR 58	Sponsor new employees
		STORE SECURITY
699	O 22	Recognize and handle shoplifters
651	O 22	a. Know how to recognize and handle shoplifters
		STORE SAFETY
660	O 2	Handle employee or customer accidents
732	O 2	Safely handle equipment
615	O 2	Use stocking safety procedures
		PRICING
710	O 9	Operate price-marking machine
644	O 9	a. Know how to operate price-marking equipment
709	O 9	Put price tickets on merchandise
645	O 9	a. Know how to put price tickets on merchandise
444	Mdse 40	Change prices on merchandise
406	Mdse 40	a. Know methods and procedures for changing prices
426	Mdse 40	b. Know procedures for recording price changes
396	Mdse 38	Know the store's price-line structure and pricing policies
364	Math 27	Calculate markup percent for merchandise
		STOCKING
838	S 24	Stock merchandise
504	PS 19	a. Know how to stock merchandise
840	S 23	b. Know how to perform housekeeping activities concerning stock
908	S 25	c. Rotate stock

RETAILING I PSYCHOMOTOR AND COGNITIVE SKILL STATEMENTS AS REFERENCED TO IDECC LEARNING ACTIVITY PACKAGES AND COMPETENCY NUMBERS
SALESPERSON/SALES CLERK

Competency Numbers	LAP Numbers	Psychomotor and Cognitive Skill Statements
698	0 8	Transfer stock
445	Mdse 3	a. Record transfer of stock
403	Mdse 30	b. Know procedures for recording transfer of stock
640	0 10	Use stockkeeping forms and reports
878	S 26	Locate and refill low stock items (reserve or under stock)
		STORAGE
648	0 10	Know the various types of merchandise storage
		RECEIVING PROCEDURES
708	0 5	Check-in merchandise against the invoice
638	0 5	a. Know procedures for checking-in merchandise against the invoice
701	0 4	Determine shipping and receiving discrepancies
634	0 11	Report and handle damaged merchandise
700	0 7	Wrap or package merchandise for return to vendor
647	0 5	Know receiving terminology
		ORDER MERCHANDISE
442	Mdse 28	Count stock for reorder
433	Mdse 9	Place orders of merchandise
430	Mdse 19	a. Know procedures for ordering merchandise
439	Mdse 19	b. Prepare merchandise order forms

RETAILING OCCUPATION REFERENCES

A Catalog of Tasks, Performance Objectives, Performance Guides, Tools and Equipment for the Warehouse Worker. Delaware: Delaware Bureau of Vocational Education in cooperation with the V-TECS, 1978.

Adult Competency Education Program. Redwood City, California: Career Preparation Division of Vocational Education, San Mateo County Office of Education, n.d.

Competencies in Distribution. Madison, Wisconisn: Distributive Education Resource Center, University of Wisconsin - Madison, n.d.

Competency Statements Master List for IDECC Instructional System. Columbus, Ohio: Interstate Distributive Education Curriculum Consortium, n.d.

IDECC Learning Activity Packages. Columbus, Ohio: Interstate Distributive Education Curriculum Consortium, n.d.

Insko, Merle A. A Catalog of Tasks, Performance Objectives, Performance Guides, Tools and Equipment for the Fashion Salesperson, edited by Pat Schrader. Kentucky: Kentucky Bureau of Vocational Education in cooperation with the V-TECS, 1978.

Insko, Merle A. Catalog of Performance Objectives, Criterion - Referenced Measures, and Performance Guides for the Retail Flower Shop Salesperson and Floral Designer, edited by Pat Schrader. Kentucky: Curriculum Development Center for Kentucky in cooperation with the Vocational - Technical Education Consortium of States, 1978.

Insko, Merle A., et al. Catalog of Performance Objectives, Criterion - Referenced Measures and Performance Guides for Cashier Checker. Lexington, Kentucky: University of Kentucky in cooperation with Kentucky Bureau of Vocational Education and the Vocational - Technical Education Consortium of States, 1975.

Job Task Reference Guide. Topeka, Kansas: Vocational Education Administration, Kansas State Department of Education, n.d.

Johnson, Tommie, et al. A Catalog of Performance Objectives and Performance Guides for Hardware Salesperson. Detroit, Michigan: Wayne State University in cooperation with Michigan Department of Education and the V-TECS, 1980.

Laking, Jon and Robin Roark. Retailing Job Analysis and Job Evaluation. New York: National Retail Merchants Association, 1975.

Lynch, Richard L., et al. Broad Content Outlines for General Merchandise Retailing. U.S. Office of Education, Contract Number 3007660308, Blacksburg, Virginia: Virginia Polytechnic Institute and State University, 1977.

Occupational Brief. Moravia, New York: Chronicle Guidance Publications, Inc., 1976-1977.

Occupational Guidance. Minneapolis, Minnesota: Finney Company, n.d.

U.S. Department of Labor, Employment, and Training Administration. Dictionary of Occupational Titles, 4th edition. Washington: U.S. Government Printing Office, 1977.

U.S. Department of Labor, Employment, and Training Administration. Occupational Outlook Handbook, 1980-81 Edition. Washington: U.S. Government Printing Office, 1981.

Williams, Terry M., Robert G. Berns, and Betty H. Turner Sipas. Task Validation of 16 General Merchandising Department Store Occupations. U.S. Office of Education, Project Number 798A#70304, Grant Number G007702226. Columbus, Ohio: Interstate Distributive Education Curriculum Consortium, 1979.